# Aurea Social Guide

VERSION 7.1.4

Unlimited Possibility

# Notices

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# 1. Planning and installation

This section guides you through the installation of the Skyvera Social. You should have administrative rights before installing these products on your information technology machines.

Read through the entire section prior to beginning the installation process. Each section has information about preparing for installation and what to have on hand, what to expect, how to handle situations, etc.

This section also includes key updates in recent releases.

### Version 5.5

In the 5.5 release, all components have had their version numbers set to 5.5. The components include:

- Core Skyvera Social solutions
- Video Stream
- Internal Communications
- Engagement Scorecard

This should make it more simple to know the current version, and ensure compatibility between the components. The 5.5 release contains the same changes added to version 5.4.37 to facilitate installing on some SharePoint 2016 configurations and is the recommended release for any SP2016 deployment.

## 1.1 Installation

This section guides you through the installation of the Aurea Social. You should have administrative rights before installing these products on your information technology machines.

Read through the entire section prior to beginning the installation process. Each section has information about preparing for installation and what to have on hand, what to expect, how to handle a situations.

This section also includes key updates in recent releases.

## 1.2 Prerequisites

> **Important**
> Social Sites is not supported in isolation of an LDAP store such as Active Directory. Social Sites installation will fail in such an environment.

> **Important**
> Multiple proxy groups and/or multiple User Profile Service Applications within the same farm are not supported configurations for SharePoint environments running Aurea Social. For further details, see the Configuration Prerequisites.

Below are the pre-requisites for installing Aurea Social:

### 1.2.1 Software prerequisites

These are the software prerequisites for installing Aurea Social:

**Prerequisites for core module**

SharePoint version

You must have a valid installation of any of the below:

- SharePoint Server 2010 with Service Pack 1 (SP1)
- Service Pack 2 (SP2)
- SharePoint 2013, Standard or Enterprise

> **Note:**
> SharePoint Foundation 2010/2013 is not supported.
> SharePoint 2010/2013 in Standalone mode is not supported.

The prerequisite check screen of the 2010 installer informs you if you don't have a valid SharePoint installation (with the exception that it does not check whether your SharePoint installation is isolated from an LDAP store, an unsupported configuration for Social Sites as mentioned below).

### Database

If you choose not to store Social Sites databases on SharePoint's default server for content databases, the server you provide must be a Microsoft SQL Server 2008 server with SP1 or above or a Microsoft SQL Server 2012 server.

Some very limited SharePoint 2010 configurations support the use of Microsoft SQL Server 2005, but NewsGator does not. SharePoint 2013 requires at least the 64-bit edition of SQL Server 2008 R2 Service Pack 1.

> **Note:**
> SQL Express is not supported.
> We recommend SQL Server 2008 R2 or SQL Server 2012 running on top of Windows Server 2008 R2 or Windows Server 2012 for the best scalability and performance.

### SharePoint cumulative updates

Although there is no prerequisite to use a certain CU, it should be mentioned that each release of Social Sites is tested with only a limited number of SharePoint 2010 bimonthly cumulative updates.

When installing on SharePoint 2010, we recommend using at least the June 2011 CU refresh (14.0.6106.5002), as all Social Sites versions beginning with 2.0 require SharePoint 2010 to have Service Pack 1 or later.

A list of all SharePoint CU's that NewsGator has tested each GA release of Social Sites since v2.0 with can be found in the topic Compatibility with SharePoint Cumulative Updates.

### .Net 4.0

Social Sites versions 4.0 and later require .Net 4.0 to be installed on the server from which you are installing. SharePoint 2013 already has this. SharePoint 2010 may need this to be installed in addition to the .Net 3.5 version it should already have.

> **NOTE:**
> As of the 5.2 release, there is an added pre-requisite check in the installer to help avoid issues with WMI infrastructure shortcomings during installs. The new pre-requisite check does two things: 1) attempts to list the Windows services on each server in the farm, and 2) attempts to remotely run a basic Windows command (`where.exe`). This covers both scenarios which the installer does things remotely.

#### Prerequisites for Enrich module

The Enrich 5.0 module requires Social Sites 5.0.

Optionally Spotlight 5.0 can be used to create badges to recognize users who create a high number of knowledge base articles and video scenarios.

The Enrich module consists of the Knowledge Base and Video Scenarios components. To use the Video Scenarios component of the Enrich module, the Video Stream 5.0 module is also required.

> **NOTE:**
> If you are upgrading please read the "Instructions regarding Video Stream and Enrich Upgrades" below.

#### Prerequisites for Video Stream Module

The Video Stream 5.0 module requires Social Sites 5.0.

Video Stream requires the use of two installers: the Social Sites 5.0 installer and the Video Stream Additional Components installer.

The Video Stream additional components installer is responsible for installing all Video Stream components that reside outside of SharePoint. These components are:

- Video Encoding service
- Streaming service

Software prerequisites for each of these components are listed below:

> **Important**
> Social Sites core with the Video Stream module MUST be installed first before installing the Video Stream Additional Components which is described below.
> It is strongly recommended that readers read the Video Stream section of planning section below before attempting to install Social Sites or the Video Stream additional components.

> **Important**
> Support for posting videos in the stream does not require installing the additional components.

#### Prerequisites for video encoding service

Install encoders based on deployment and usage scenarios below:

### Encoder Installation Scenarios

| Deployment/Usage | Browser/Smooth Streaming/VC1 | Browser/Progressive Download/VC1 |
|---|---|---|
| Native Video Stream | Microsoft Expression Encoder4.0 (Free version) [default] | Microsoft Expression Encoder 4.0 (Free version)*** |
| Video Stream with Kontiki Integration | N/A | Microsoft Expression Encoder4.0 (Free version) [Default] |

| Deployment/Usage | Browser/Progressive Download/H264 | Mobile/Progressive Download/H264 |
|---|---|---|
| Native Video Stream | FFMPEG/QT-FAST-START*** | FFMPEG/QT-FAST-START *** |
| Video Stream with Kontiki Integration | FFMPEG/QT-FAST-START*** | N/A |

***For further details, see Configuring the Video Stream Encoder.

> **Note:**
> Thumbnail generation is done by Microsoft Expression Encoder but can be configured to use FFMPEG. See Appendix L - Configuring the Video Stream Encoder to enable this option.

To install Microsoft Expression Encoder you have to:

» Install .Net Framework version 4.0

» Download and install the Microsoft Expression Encoder from: http://www.microsoft.com/en-us/-download/details.aspx?id=27870

» The Desktop Experience role must be activated

» Recommend installing (but optional to support popular audio codecs): Apple QuickTime (iTunes is not required)

» Install additional codecs as required. For example, there are codec libraries that support FLV1that we have experimented with in the lab like the ones from K-Lite Codec Pak (http://www.codecguide.com/about_kl.htm) In this case we loaded the FLV1 codec only to minimize clobbering the existing codecs installed and have not tested the possible (but remote) impact on the other installed codecs. Be sure to install additional codecs with the account that the encoding service is run as.

To install FFMPEG/QT-FAST-START:

1. 1. Download the following encoding tools:

» 32 Bit

- http://ffmpeg.zeranoe.com/builds/win32/static/ffmpeg-20121125-git-26c531c-win32-static.7z
- http://ffmpeg.zeranoe.com/builds/qt-faststart/win32/qt-faststart-git-91a4abd8-win32.7z

» 64 Bit

- http://ffmpeg.zeranoe.com/builds/win64/static/ffmpeg-20121125-git-26c531c-win64-static.7z
- http://ffmpeg.zeranoe.com/builds/qt-faststart/win64/qt-faststart-git-91a4abd8-win64.7z

2. Extract the contents of the FFMPEG file.

3. Copy the ffmpeg.exe from the bin folder to the root folder of the Video Stream encoding service

4. Copy the content of the presets folder to a new folder named ffpresets at the root folder of the Video Stream encoding service folder.

5. Extract the contents of the QT-FastStart file.

6. Copy qt-faststart.exe to the root folder of the Video Stream encoding service.

Note: Unless changed during the installation of the Video Stream additional components, the encoding service

#### Prerequisites for Streaming Service Software

The following will need to be installed on the server before installation if you are using Smooth Streaming:

» IIS version 7+

» IIS Media Services version 4+ (http://www.iis.net/download/SmoothStreaming)

» .NET Framework version 3.5 SP1

» .NET Framework version 4.0 (required only by the Additional Components installer)

» ASP.NET

### 1.2.2 Configuration prerequisites

> **Note:**
> Since the 4.5 release, we also deploy our solutions on to the Central Admin web application. For you APP servers you can achieve this by running the SharePoint Foundation Web Application Service OR have Central Administration deployed on your application servers.

Below are the configuration prerequisites:

» **LDAP Store:** Social Sites is not supported in isolation of an LDAP store such as Active Directory. Social Sites installation fails in such an environment.

» **No Multiple Proxy Groups nor Multiple USPA's:** Multiple proxy groups are not supported. Nor are multiple User Profile Service Applications running in the same farm.

» SharePoint service applications such as SharePoint's **User Profile Application**, **Search**, **Business Connectivity Services**, and N**ewsGator's Social Sites** run in the context of a proxy group.

» By default, all Service Applications run in the default proxy group. Multiple proxy groups are not a supported configuration for SharePoint environments running Aurea Social. But, if you still run multiple proxy groups, Aurea Social and the User Profile Service Application that it uses must exist in the default proxy group.

» **AntiXss Library:** The `AntiXssLibrary` is required on the server which runs the NewsGator Social platform Service application. Without this, community activity streams does not display usernames nor avatars, nor can users be able to 'like' or 'follow-up' on events.

» If the `AntiXssLibrary dll` is not in the GAC on this server, it can be put there by going to **Central Administration -> System Settings -> Manage Farm Solutions** and deploying the `SharePoint.ajax.wsp` solution to the server that hosts the NewsGator social platform services application. From the drop down menu choose CA app. Then recycle the NewsGator backend app pool.

## 1.3 Aurea Social install settings you can change via SharePoint Central administration

The following installation settings may be changed outside of the Aurea Social setup wizard via SharePoint's Central Administration site.

| Setting | Where to change it |
|---|---|
| License Key | **SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform**.<br>In the Configuration section, click **View/Edit License**. |
| Email List Website Location | **SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform**.<br>In the **Email and Notifications** section, click **Configure Email Settings**. Then use the **Email Handler** section. |

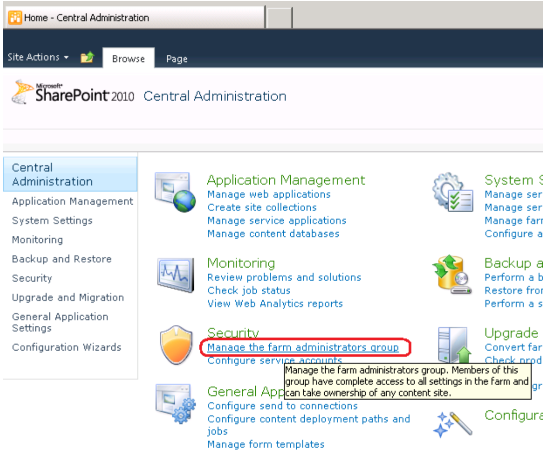
## 1.4 Setting up your account with the SharePoint permissions that are needed to install Aurea Social

This topic covers how to grant the following rights in SharePoint 2010:

### How to grant an account SharePoint 2010 Farm administrator rights

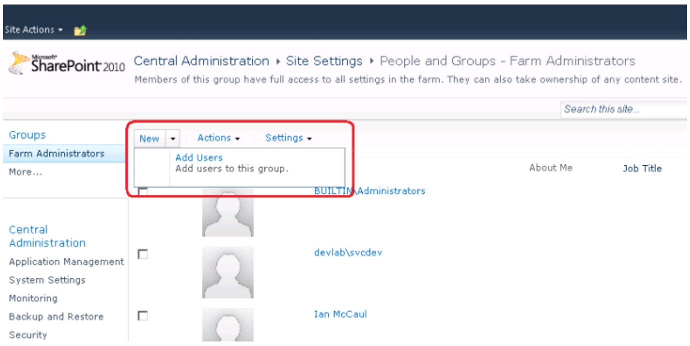
1. Open **SharePoint Central Administration**.

2. Under the **Security** area, click the **Manage the farm administrators group** link. The **People and Groups - Farm Administrators** page appears.




*Screenshot 1: SharePoint Central Administration*

3. Open the **New menu** and select **Add Users**. A dialog window titled **Grant Permissions** displays.




*Screenshot 2: Select **Add Users***

4. Type the name of the account that you want to be a farm administrator, with domain name, in the box at the top of the dialog.

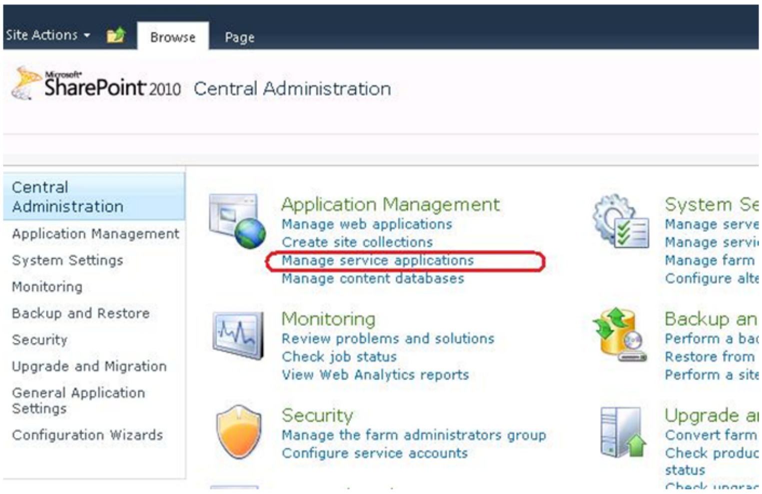
5. Click the **Check user** icon below the box to validate the username you just entered. When you have it correct, click the **OK** button.


*Screenshot 3: **Grant Permission** window*

## How to make an account an administrator of the User Profile Service Application

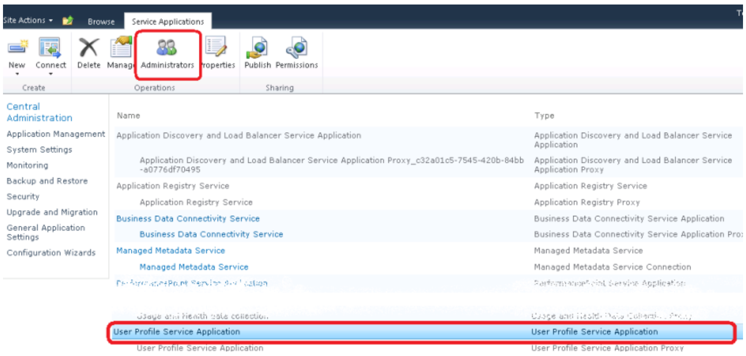
1. Open **SharePoint Central Administration**.

2. Under the **Application Management** area, click the **Manage Service Applications** link.




*Screenshot 4: Click **Manage Service Applications***

3. From the list that appears, highlight **User Profile Service Application** (but do not click on the name itself, which navigates away to a different page).




*Screenshot 5: Highlight **User Profile Service Application***

4. In the menu area, click **Administrators**. A dialog window titled **Administrators for the User Profile Service Application** displays.

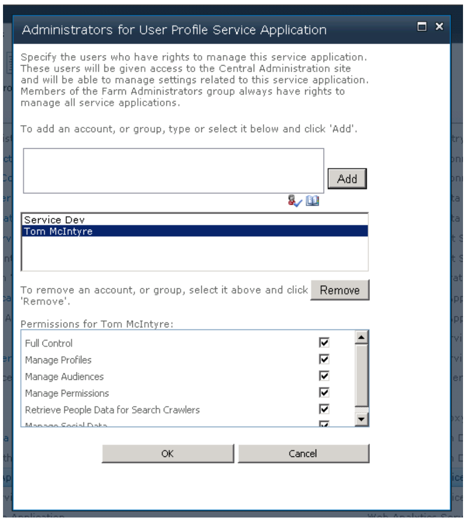
5. Type the name of the account that you want to be an administrator, with domain name, in the box at the top of the dialog.

6. Click the **Check user** icon below the box to validate the username you just enetered. 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 for <user>** box at the bottom, check **Full Control**.

9. Click **OK** to close the dialog.



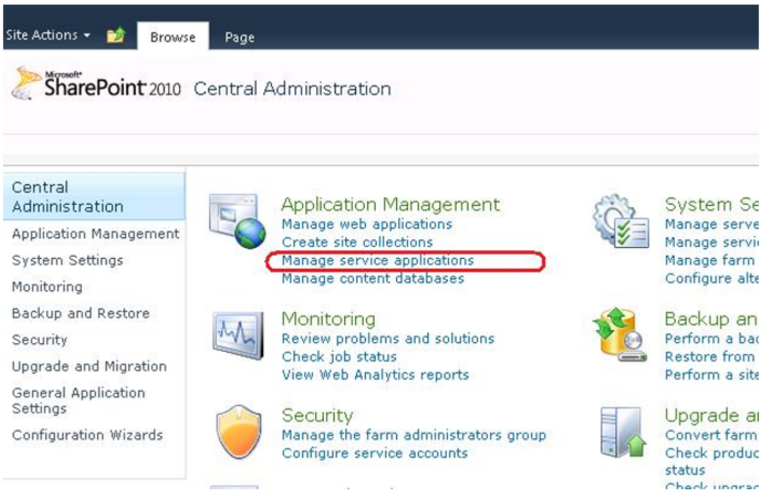

*Screenshot 6:* ***Administrators for the User Profile Service Application*** *window*

## How to grant an account full sharing access to the User Profile Service Application

Open **SharePoint Central Administration**.

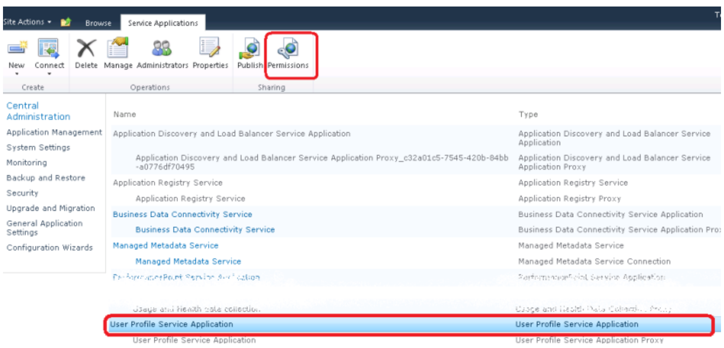
1. Under the **Application Management** area, click the **Manage Service Applications** link.

2. From the list that appears, select the service application of type **User Profile Service Application** (but do not click on the name itself, which navigates away to a different page).




*Screenshot 7: Highlight* ***User Profile Service Application***

3. In the menu area, click **Permissions**. A dialog window titled **Connection Permissions for User Profile Service Application** displays.




*Screenshot 8: Click* ***Permissions***

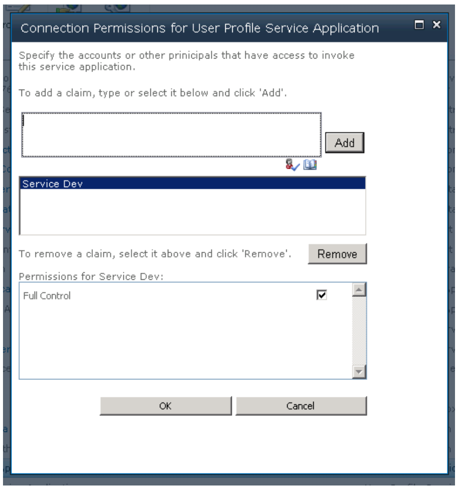
4. Type the name of the account, with domain name, to which you want to grant connection/invoking permissions to the **User Profile Service Application**, in the box at the top of the dialog.

5. Click the **Check user** icon below the box to validate the username you just entered. When you have it correct, click the **Add** button.

6. Make sure this account is now selected in the middle box.

7. In the **Permissions ...** box at the bottom, check **Full Control**.

8. Click **OK** to close the dialog.




*Screenshot 9: **Connection Permissions for User Profile Service Application** window*

## 1.5 Granting isolated app pools access to each other

For Aurea Social versions 2.0 and later, it is no longer necessary to grant web applications that have Aurea Social installed on them full access to the other web applications that have Aurea Social, when using account pool isolation (different security accounts on all your web applications).

This topic, instructing how to do this, has therefore been removed.

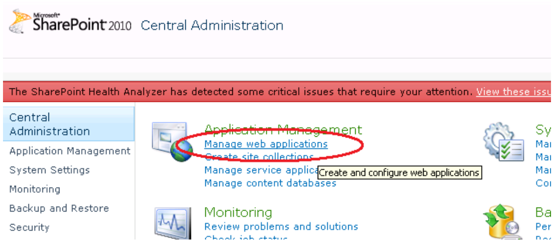
## 1.6 Creating a Aurea Social admin site

After completing installation of Aurea Social, you may want to create a Aurea Social admin site to allow administrators access to globally-scoped reports, and broadcast message capability.

> **Note:**
> The first 5 steps below are optional. These are required only if you want to give your Admin site collection a particular path and you're not sure there's a managed path defined to support that path.

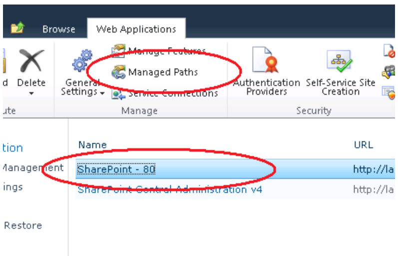
1. Open SharePoint **Central Administration**.

2. Under the **Application Management** area, click the **Manage Web Applications** link.




Screenshot 10: Click ***Manage Web Applications***

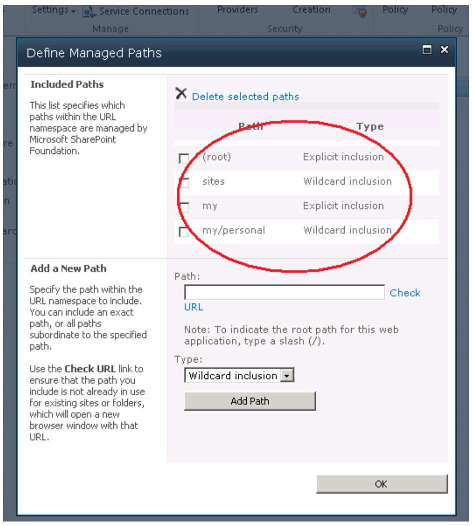
3. From the list that appears, select the web application where you want the site to be located, then click **Managed Paths**. A dialog window titled **Define Managed Paths** displays.




Screenshot 11: Click ***Managed Paths***

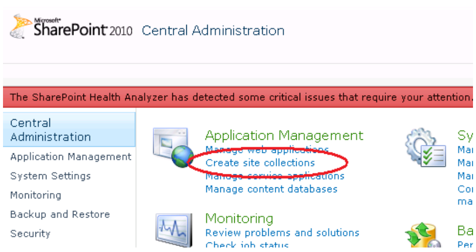
4. Check the list of defined managed paths for the one you want your site collection at (Explicit Inclusion) or directly under (Wildcard Inclusion). If it does not exist, use the **Add a New Path** section to create it.

5. Click **OK** to close the dialog.



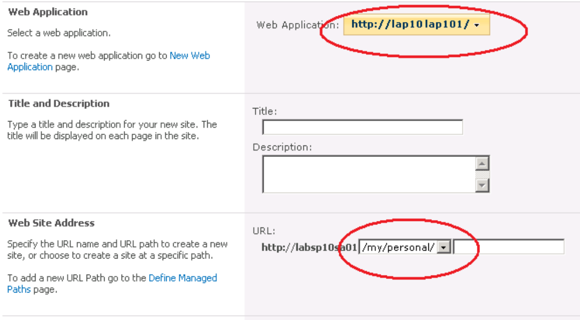

Screenshot 12: Define Managed Paths

6. Return to the main **Central Administration** page and click **Create site collections**.




Screenshot 13: Click ***Create site collections***

7. When filling out the **Create Site Collection** page, make sure you have specified your desired location by first selecting the desired web application at the top, and the desired path in the **Web Site Address** section.




*Screenshot 14: Select desired web application*

8. In the **Template Selection** section, select the **NewsGator** tab, and within that, the **NewsGator Administration** template.


*Screenshot 15: Select* ***NewsGator***

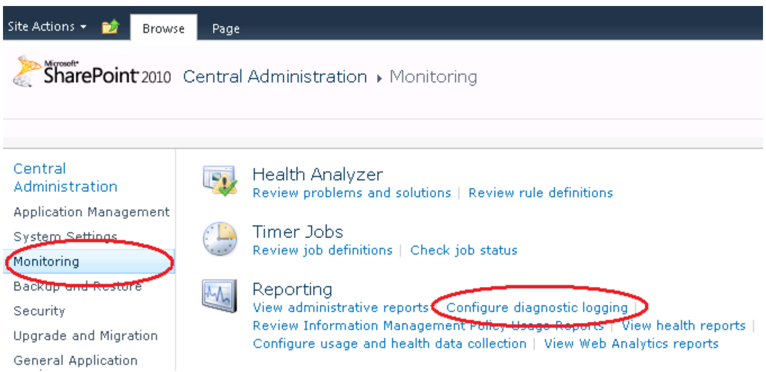
## 1.7 Adding warnings from Aurea Social to the event log

After completing your initial installation, by default Aurea Social will log errors, but not warnings. NewsGator recommends you change this setting so that warnings are logged as well. To do so, follow the instructions below.

1. Open **SharePoint Central Administration**.

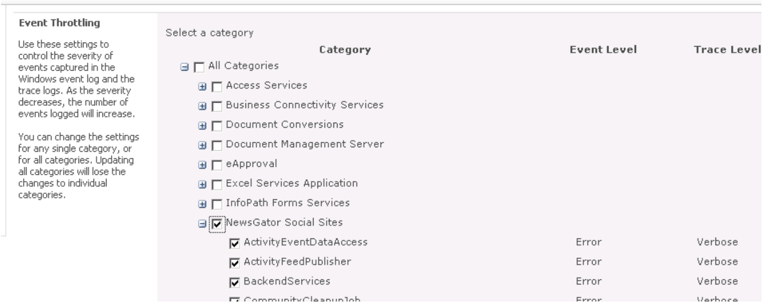
2. Go to the **Monitoring** section.

3. Under **Reporting**, click **Configure diagnostic logging**.




*Screenshot 16: Click* ***Configure diagnostic logging***

4. In the **Event Throttling** section of the **Diagnostic Logging** page, check and expand **NewsGator Social Sites**. All items underneath should become checked as well.

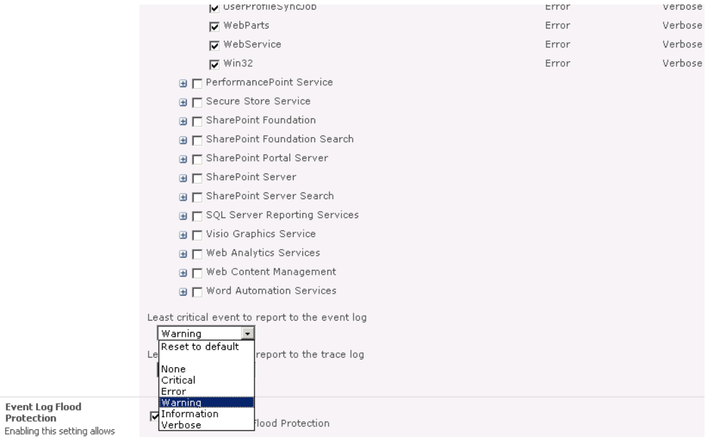



Screenshot 17: Expand ***NewsGator Social Sites***

5. Below this, set **Least critical event to report to the event log** to **Warning**.

6. Adjust the setting **Least critical event to report to the trace log** if you prefer something different than the default.

7. Scroll to the bottom and click **OK**



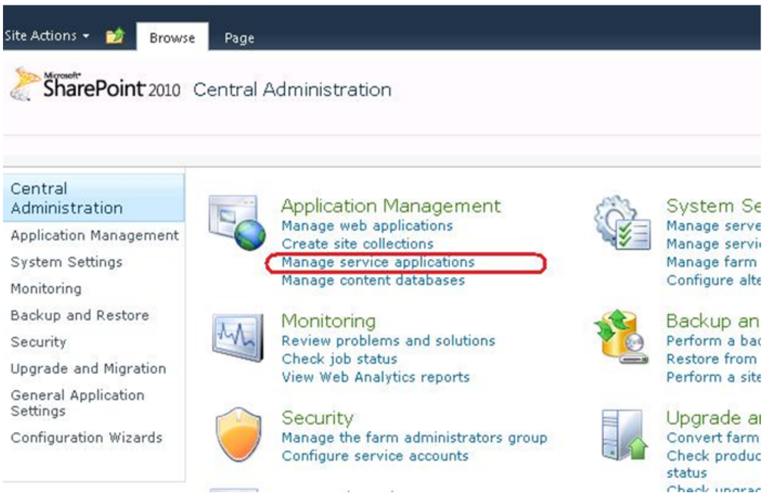

Screenshot 18: Adjust ***Least critical event to report to the event log***

# 1.8 How to grant rights to delete all events

Below are the steps to grant access to delete all events:

1. Open SharePoint **Central Administration**.

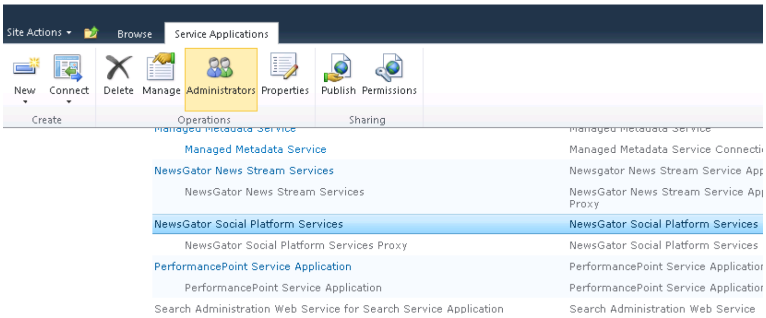
2. Under the **Application Management** area, click the **Manage Service Applications** link.




Screenshot 19: Click ***Manage Service Applications***

3. From the list that appears, select **NewsGator Social Platform Services** (do not click on the name itself, which navigates away to a different page).

4. In the menu area, click **Administrators**. A dialog window titled **Administrators for NewsGator Social Platform Services** displays.




*Screenshot 20: Click **Administrators***

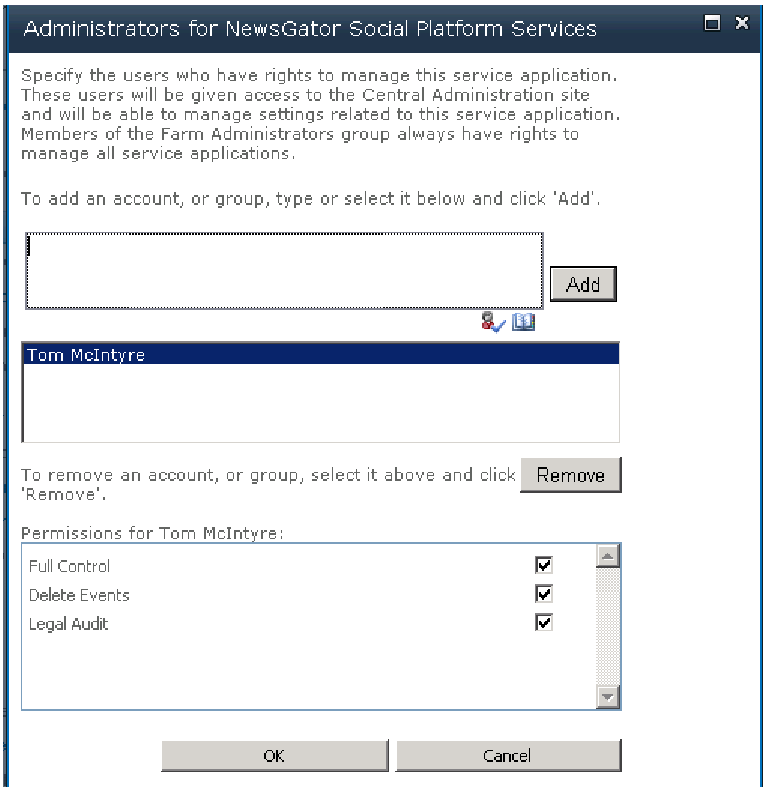
5. Type the name of the account that you want to be an administrator, with domain name, in the box at the top of the dialog.

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 for <user>…** box at the bottom, check **Delete Events** to allow the user to delete any activity stream event in the system.

9. Click **OK** to close the dialog.




*Screenshot 21: **Administrators for NewsGator Social Platform Services** window*

## 1.9 Connecting Child Farms to NewsGator Services on the Parent Farm

For Aurea Social to work properly in a multi-farm environment, the child farms must connect to the parent farm's NewsGator Social Platform Service.

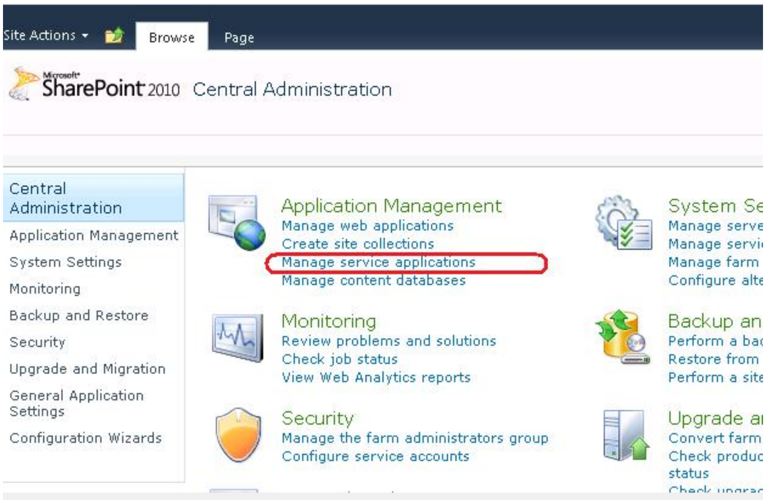
The same is true of the managed service applications of some modules that may be included with your installation of Aurea Social.

Below are instructions on how to do this. They are described in two stages:

## Stage I. Publishing the services from the parent farm

1. Open SharePoint **Central Administration** on the parent farm.

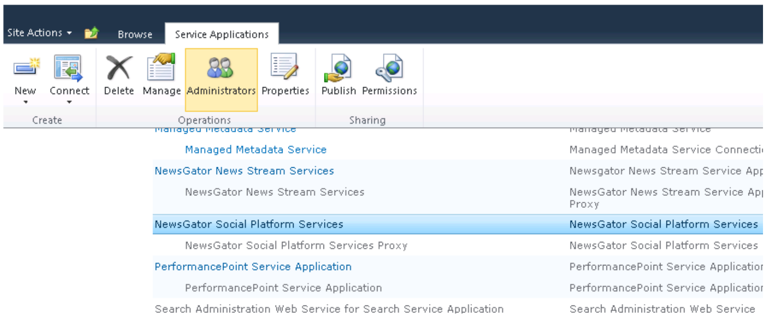
2. Under the **Application Management** area, click the **Manage Service Applications** link.




*Screenshot 22: Click **Manage Service Applications***

3. From the list that appears, select **NewsGator Social Platform Services** (or NewsGator News Stream Services, or other module's service; but do not click on the name itself, which navigates away to a different page).

4. In the menu area, click **Publish**. A dialog window titled **Publish Service Application** displays.



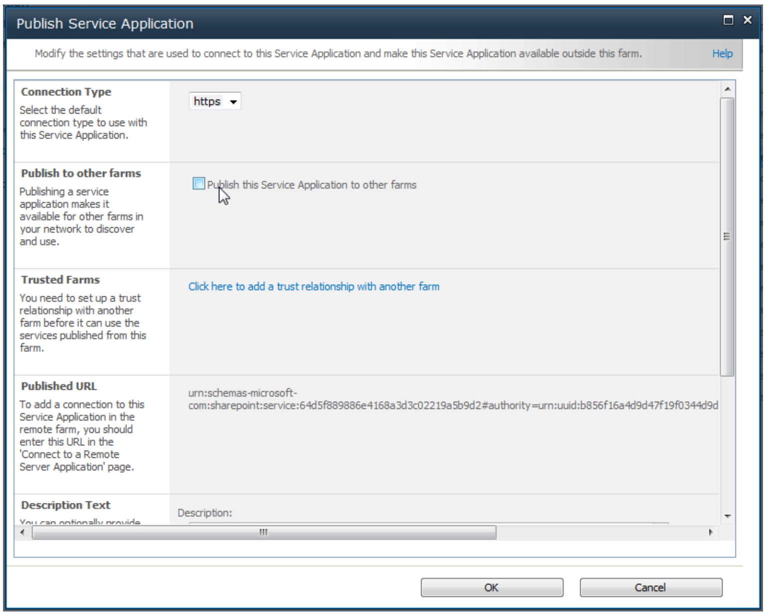

*Screenshot 23: Click **Publish***

5. Check **Publish this Service Application to other farms**.

6. If not all the child farms have a trust relationship as yet with the parent farm, this needs to be set up. The link in the **Trusted Farms** section gives you the opportunity to do so now.

7. Copy and save the **Published URL** for use later in this process.

8. Click **OK** to close the dialog and publish the service.

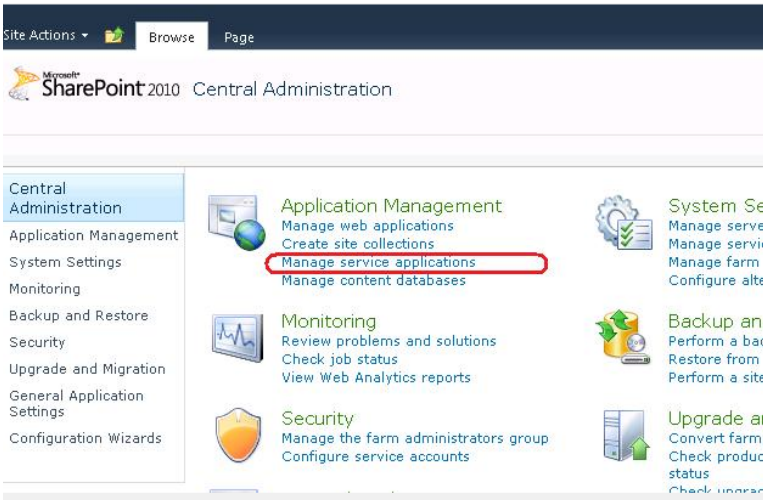



*Screenshot 24: Check **Publish this Service Application to other farms**.*

## Stage II. Connecting to the services from each child farm

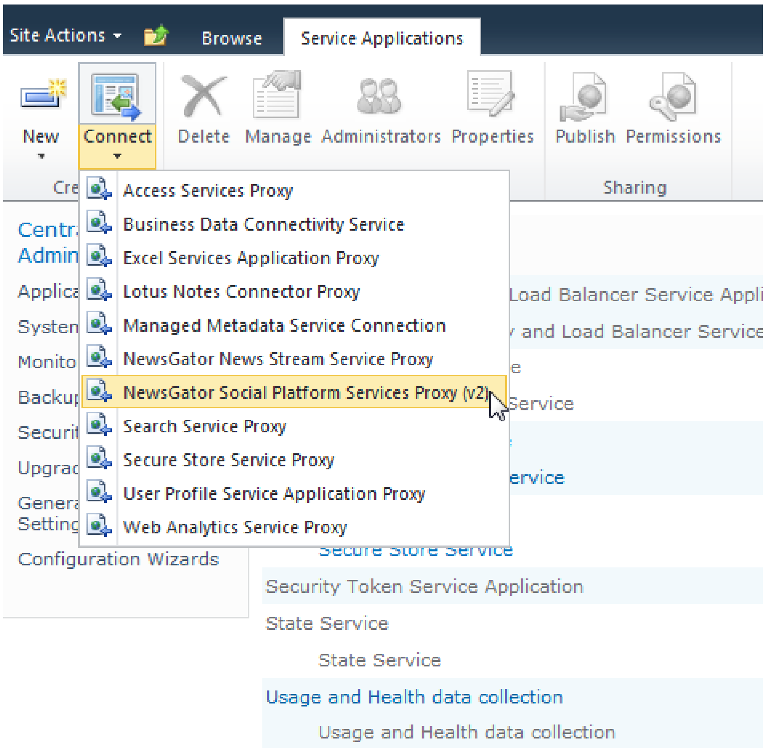
1. Open **SharePoint Central Administration** on a child farm.

2. Under the **Application Management** area, click the **Manage Service Applications** link.




*Screenshot 25: Click **Manage Service Applications***

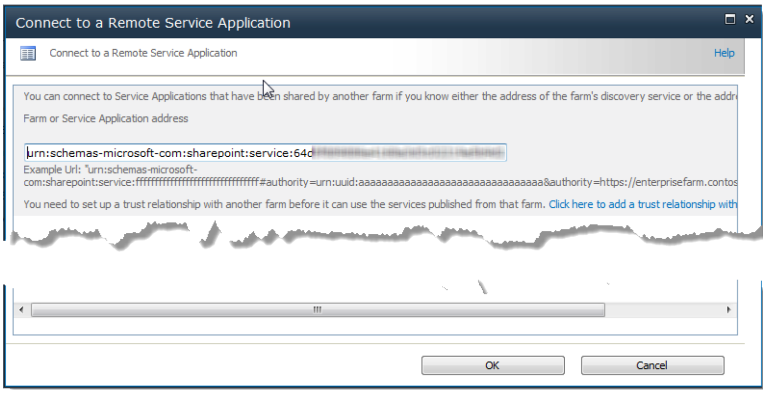
3. At the top of the page that appears, click **Connect**, then select the service you want to connect to (NewsGator Social Platform Services, NewsGator News Stream Services, NewsGator Enrich Services, or other module's service).




*Screenshot 26: Click Connect*

4. A dialog, **Connect to a Remote Service Application** appears. Enter the **Published URL** of the service you're trying to connect to ( copied in step 7 of Stage I: Publishing the services from the parent farm).

5. Click **OK**

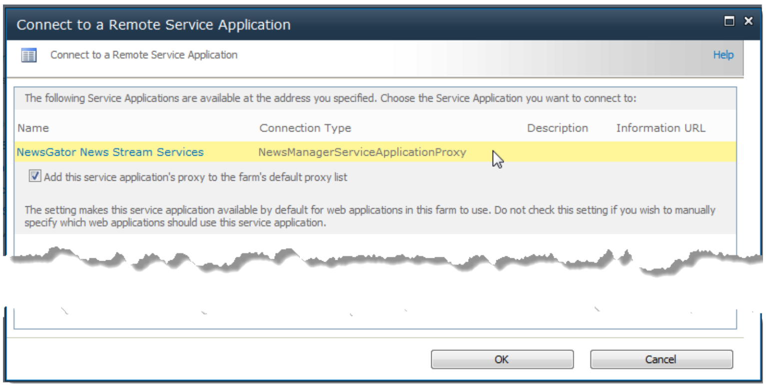



*Screenshot 27: **Connect to a Remote Service Application** window*

6. The dialog remains and now displays all service applications that are at the URL you specified. There should be only one item in the list. Select it.

7. Leave **Add this service application's proxy to the farm's default proxy list** checked.

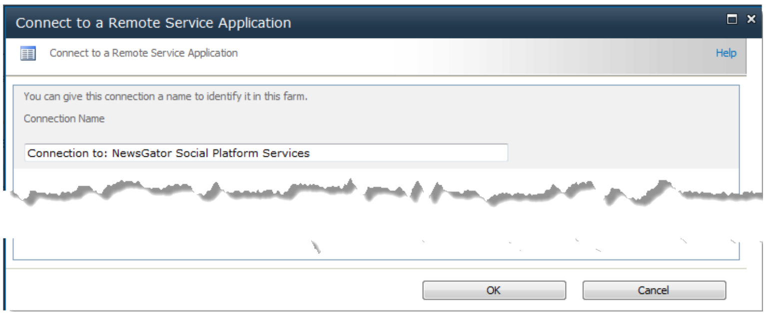
8. Click **OK**




*Screenshot 28: Select the item in the list*

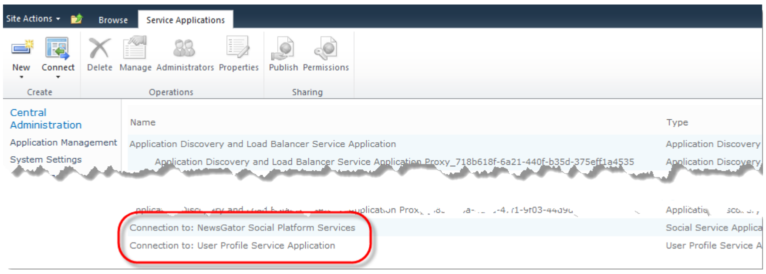
9. Rename the connection (Optional).

10. Click **OK**




*Screenshot 29: Rename the connection if you want*

11. Repeat steps 3-9 for each service application you need to connect to from the parent farm. When completed, you'll see something like the following on the **Manage Service Applications** page:




*Screenshot 30: **Connect to a Remote Service Application** page*

12. Repeat steps 1-11 for each child farm.

## 1.10 Compatibility with SharePoint cumulative updates

The follow chart lists which SharePoint 2010 Cumulative Updates (CU's) have been tested successfully with which releases of Aurea Social, since the 2.0 release.

That a CU does not appear on this list with a certain release should not be taken as an implication that they are incompatible. Most likely, that Aurea Social release was just not tested with that CU.

Aurea Social compatibility testing with SharePoint CU's

| Release Date | Release build | Service Pack | CU release | CU version |
|---|---|---|---|---|
| **Version 5.0** | | | | |

| Release Date | Release build | Service Pack | CU release | CU version |
|---|---|---|---|---|
| October 9, 2014 | 5.0.7 | 2013 SP1r2 | Service Pack 1 rel. 2 | 15.0.4569.1000 |
| | | 2010 SP2 | July 2014 | 14.0.7128.5000 |
| **Version 4.5** | | | | |
| August 21, 2014 | 4.5.211 | 2013 SP1r2 | Service Pack 1 rel. 2 | 15.0.4569.1000 |
| | | 2010 SP2 | July 2014 | 14.0.7128.5000 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| July 23, 2014 | 4.5.176 | 2013 SP1r2 | Service Pack 1 rel. 2 | 15.0.4569.1000 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| June 10, 2014 | 4.5.128 | 2013 SP1r2 | Service Pack 1 rel. 2 | 15.0.4569.1000 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| April 30, 2014 | 4.5.97 | 2013 RTM | October 2013 | 15.0.4551.1001 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| April 7, 2014 | 4.5.82 | 2013 RTM | October 2013 | 15.0.4551.1001 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| February25, 2014 | 4.5.21 | 2013 RTM | October 2013 | 15.0.4551.1001 |
| | | 2010 SP2 | December 2013 | 14.0.7113.5000 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| | | 2010 SP1 | April 2013 | 14.0.6137.5000 |
| **Version 4.1** | | | | |
| December 5, 2013 | 4.1.106x | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| | | 2010 SP2 | August 2013 | 14.0.7106.5002 |
| November 12, 2013 | 4.1.1034 | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |
| | | 2010 SP2 | August 2013 | 14.0.7106.5002 |
| October 18, 2013 | 4.1.967 | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP2 | August 2013 | 14.0.7106.5002 |
| **Version 4.0** | | | | |
| November 18, 2013 | 4.0.266 | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP2 | October 2013 | 14.0.7108.5000 |

| Release Date | Release build | Service Pack | CU release | CU version |
|---|---|---|---|---|
| June 18, 2013 | 4.0.143 | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP1 | April 2013 | 14.0.6137.5000 |
| | | 2010 SP1 | December 2012 | 14.0.6131.5003 |
| | | 2010 SP1 | June 2011 refresh | 14.0.6106.5002 |
| May31, 2013 | 4.0.101 | 2013 RTM | February 2013 | 15.0.4420.1017 |
| | | 2010 SP1 | December 2012 | 14.0.6131.5003 |
| | | 2010 SP1 | June 2011 refresh | 14.0.6106.5002 |
| **Version 3.5** | | | | |
| May1, 2013 | 3.5.2277 | SP1 | February 2013 | 14.0.6134.5000 |
| | | SP1 | December 2012 | 14.0.6131.5003 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| April 3, 2013 | 3.5.2252 | SP1 | February 2013 | 14.0.6134.5000 |
| | | SP1 | December 2012 | 14.0.6131.5003 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| March 4, 2013 | 3.5.2237 | SP1 | February 2013 | 14.0.6134.5000 |
| | | SP1 | December 2012 | 14.0.6131.5003 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| Febuary 22, 2013 | 3.5.2227 | SP1 | February 2013 | 14.0.6134.5000 |
| | | SP1 | December 2012 | 14.0.6131.5003 |
| | | SP1 | August 2012 | 14.0.6126.5000 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| January 31, 2013 | 3.5.2130 | SP1 | December 2012 | 14.0.6131.5003 |
| | | SP1 | August 2012 | 14.0.6126.5000 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| Version 3.1 | | | | |
| October 26, 2012 | 3.1.1032 | SP1 | August 2012 | 14.0.6126.5000 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| **Version 3.0** | | | | |
| August 10, 2012 | 3.0.101 | SP1 | June 2012 | 14.0.6123.5002 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| **Version 2.6** | | | | |

| Release Date | Release build | Service Pack | CU release | CU version |
|---|---|---|---|---|
| July 23, 2012 | 2.6.685 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| May 15, 2012 | 2.6.615 | SP1 | February 2012 | 14.0.6117.5002 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| April 27, 2012 | 2.6.589 | SP1 | February 2012 | 14.0.6117.5002 |
| | | SP1 | December 2011 | 14.0.6114.5000 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| March 28, 2012 | 2.6.526 | SP1 | February 2012 | 14.0.6117.5002 |
| | | SP1 | December 2011 | 14.0.6114.5000 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| March 12, 2012 | 2.6.485 | SP1 | February 2012 | 14.0.6117.5002 |
| | | SP1 | December 2011 | 14.0.6114.5000 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| **Version 2.5** | | | | |
| January 31, 2012 | 2.5.1059 | SP1 | December 2011 | 14.0.6114.5000 |
| | | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| **Version 2.1** | | | | |
| November 29, 2011 | 2.1.1188 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| October 18, 2011 | 2.1.1120 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| October 17, 2011 | 2.1.1115 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| October 7, 2011 | 2.1.1084 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| **Version 2.0** | | | | |
| November 11, 2011 | 2.0.1687 | SP1 | August 2011 | 14.0.6109.5002 |
| | | SP1 | -- | 14.0.6029.1000 |

| Release Date | Release build | Service Pack | CU release | CU version |
|---|---|---|---|---|
| August 25, 2011 | 2.0.1542 | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| August 8, 2011 | 2.0.1483 | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| July 18, 2011 | 2.0.1436 | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |
| June 30, 2011 | 2.0.1377 | SP1 | June 2011 refresh | 14.0.6106.5002 |
| | | SP1 | -- | 14.0.6029.1000 |

## 1.11 Using Powershell to perform a scripted install of Aurea Social on SharePoint 2010 SP1 or SharePoint 2013

These instructions are used for installations of eitherSharePoint 2010 SP1 or SharePoint 2013.

### Before you begin

Before performing a scripted install of Aurea Social as outlined in this topic, read and follow all sections of this topic before the section titled Proceeding with Aurea Social Install/Upgrade/Repair.

Once the instructions in Compatibility with SharePoint Cumulative Updates are completed, you may find helpful suggestions in the subsection of the topic Install/Upgrade/Repair, if something goes wrong during install. Then proceed to the Next Steps section to check for other steps you'll want to perform.

### Installing

Aurea Social comes witha PowerShell-based installer that can be used to perform scripted installs to SharePoint 2010 SP1 or to SharePoint 2013. It can be found in the Scripts folder of the installation package. To launch PowerShell with both the SharePoint SnapIns and the Aurea Social Cmdlets loaded, run the Aurea Social Management Shell link from the Scripts folder.

From that command prompt, the following commands are available:

#### Install-SocialSites

For a new install, you first need to create the Service Application Pool in SharePoint for Aurea Social. If installing News Manager, a second one is needed for it.

**Example:**

```
New-SPServiceApplicationPool "NewsGator_PlatformServices"
```

```
New-SPServiceApplicationPool "NewsGator_NewsManager"
```

(Each will ask for the service account to run under.)

Once the service applications are created, they need to be assigned to variables:

**Example:**

```
$appPool = Get-SPServiceApplicationPool "NewsGator_PlatformServices"
```

```
$nmAppPool = Get-SPServiceApplicationPool "NewsGator_NewsManager"
```

Now the Install-SocialSites cmdlet can be run.

**Example:**

```
Install-SocialSites -LiteralPath $pwd -DatabaseServer "SERVERNAME (NOT LOCALHOST)" -
DatabaseName "NewsGator_SocialServices" -ReportDatabaseName "NewsGator_Reporting" -
EmailListWebUrl "http://SERVERNAME" -MySiteWebUrl "http://SERVERNAME/my" -AllWe-
bApplications -LicenseKey "Your Key Here" -ReplaceMySiteWebParts -ApplicationPool $ap-
pPool -NewsManagerDatabaseName "NewsGator_NewsManager" -NewsManagerApplicationPool
$nmAppPool -Verbose
```

## Details

- **-LiteralPath**: path to the solutions folder, if currently in the solutions folder `$pwd` can be used
- **-DatabaseServer**: where to put the NewsGator databases, cannot be LOCALHOST or . (dot), you need to specify the machine name
- **-DatabaseName**: name of the platform services database
- **-ReportingDatabaseName**: name of the reporting database
- **-EmailListWebUrl**: URL of the SharePoint site to put the email lists
- **-MySiteWebUrl**: URL of the My Site
- **-AllWebApplications {OR} -WebApplications** "url 1", "url 2": specify which content web applications to deploy NewsGator to
- **-LicenseKey**: the license key provided by NG
- **-ReplaceMySiteWebParts**: without this flag, the My Site would stay as default OOTB SharePoint, with it the web parts are replaced with the NewsGator web parts
- **-ApplicationPool:** the SharePoint Service Application Pool for the platform services
- **-NewsManagerDatabaseName**: name of the news manager database
- **-NewsManagerApplicationPool**: the SharePoint Service Application pool for the news manager
- **-Verbose**: enabled more details output to the console (use for logging or if having issues to help identify where the issue occurs)

## Video-Stream-Specific options

**-VideoApplicationPool**: SharePoint Service Application pool for video stream.

**-VideoEncodingInputFolder**: path to the encoding input folder (aka to be encoded folder). UNC paths are allowed.

**-VideoEncodingOutputFolder**: path to the encoding output folder (aka encoded folder). UNC paths are allowed.

**-VideoStreamingServerFolder**: physical path to the streaming folder on the streaming server. UNC paths are allowed.

**-VideoUploadFolder**: physical path to the upload folder on the WFE. UNC paths are allowed.

**-VideoStreamingServerUrlDefaultZone**: URL for the default zone to the streaming server's streaming content on the streaming server.

**-VideoStreamingServerUrlIntranetZone**: URL for the Intranet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

**-VideoStreamingServerUrlInternetZone**: URL for the Internet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

**-VideoStreamingServerUrlCustomZone**: URL for the Custom zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

**-VideoStreamingServerUrlExtranetZone**: URL for the Extranet zone to the streaming server's streaming content on the streaming server. (OPTIONAL)

Enrich-Specific options:

**-LearningApplicationPool**: the SharePoint Service Application pool for Enrich.

**-LearningGlobalKnowledgeBase**: The URL to the Global Knowledge Base

**Manual steps**

Enable site collection features before enabling web features:

» NewsGator Common Libraries feature (Site)
» NewsGator Knowledge Base (Site)
» NewsGator Knowledge Base Fields for SharePoint 2013 (Site)
» NewsGator Video Scenarios (Site)
» NewsGator Video Scenarios Fields for SharePoint 2013 (Site)
» NewsGator VideoStream Fields for SharePoint 2013 (Site)
» NewsGator VideoStream UI (Site)

**Update-SocialSites**

To update an existing install, run:

```
Update-SocialSites -LiteralPath $pwd -Verbose
```

**Uninstall-SocialSites**

To remove Aurea Social (might need to use if the install failed and need to retry):

```
Uninstall-SocialSites -RemoveSocialSites -Verbose
```

## 1.12 Managing your Aurea Social installation with PowerShell

Windows PowerShell is a command-line scripting shell that provides administrators the ability to perform administrative operations using specialized commands called `Cmdlets`.

The Cmdlets provided by the Microsoft SharePoint Management Shell is the preferred, and sometimes the only, method for performing certain administrative tasks for SharePoint.

Installation and configuration of Aurea Social may also be accomplished with PowerShell Cmdlets in the Aurea Social Management Shell.

The following Cmdlets are available in the management shell.

> **Note:**
> For more details about each Cmdlet and their usage, use the Get-Help Cmdlet in the management shell.

» `Install-SocialSites`: Performs a new installation of Aurea Social.
» `Update-SocialSites`: Performs an upgrade of an existing installation of Aurea Social.
» `Uninstall-SocialSites`: Performs an uninstall of an existing installation of Aurea Social.
» `Get-SocialSitesActivityTypes`: Gets a list of SharePoint Activity Types installed to the SharePoint farm.
» `Disable-SocialSitesFeatures`: Disables Aurea Social SharePoint features.

» `Update-SocialSitesFeatures`: Ensures each Aurea Social SharePoint feature activated is up-to-date with the currently installed feature definition.

» `Initialize-SocialSitesFeatures`: Re-activates the Aurea Social SharePoint farm features for the Video, Enrich, and Innovation modules.

» `Remove-SocialSitesOrphanedFeatures`: Removes old features from previous versions of Aurea Social (formerly called "Social Sites"), primarily for the Video module.

» `Disable-SocialSitesJobs`: Disables all Aurea Social timer jobs.

» `Enable-SocialSitesJobs`: Enables all disabled Aurea Social timer jobs.

» `Start-SocialSitesAdminJobs`: Manually executes the SharePoint Administration jobs.

» `Restart-SocialSitesTimerService`: Executes the SharePoint Timer Service recycle job.

» `Disable-SocialSitesUserProfileJob`: Disables the SharePoint user profile synchronization job.

» `Enable-SocialSitesUserProfileJob`: Enables the SharePoint user profile synchronization job.

» `Get-SocialSitesModules`: Gets a list of Aurea Social modules currently installed.

» `Install-SocialSitesModules`: Installs a Aurea Social module without running a full install of Aurea Social.

» `Remove-SocialSitesModules`: Removes a Aurea Social module without running a full uninstall of Aurea Social.

» `Update-SocialSitesModules`: Updates a Aurea Social module without running a full update of Aurea Social.

» `Export-SocialSitesConfiguration`: Exports detailed information about the SharePoint and Aurea Social instances.

» `Get-SocialSitesConfiguration`: Gets detailed information about the SharePoint and Aurea Social instances.

» `New-SocialSitesServiceApplication`: Provisions a new Aurea Social service application.

» `Remove-SocialSitesServiceApplication`: Removes an existing Aurea Social service application.

» `Update-SocialSitesServiceApplication`: Updates an existing Aurea Social service application.

» `Set-SocialSitesCaching`: Configures caching in Aurea Social.

» `Enable-SocialSitesDebugger`: Enables the Just-In-Time debugger on the local machine if previously disabled with the `Disable-SocialSitesDebugger` Cmdlet.

» `Disable-SocialSitesDebugger`: Disables the Just-In-Time debugger on the local machine.

» `Enable-SocialSitesMySiteLookout`: Enables Lookout on the My Site host.

» `Set-SocialSitesMySiteLookoutHomePage`: Sets Lookout as the home page of the My Site host.

» `Set-SocialSitesMySiteNewsFeedWebParts`: Replaces the web parts on the My Site Newsfeed page with Aurea Social web parts.

» `Enable-SocialSitesMySiteWebParts`: Enables the Aurea Social web parts feature on the My Site host.

» `Update-SocialSitesNotificationProviders`: Updates the Aurea Social notification providers.

» `Restart-SocialSitesServices`: Restarts SharePoint and IIS services on each server in the farm.

» `Add-SocialSitesSolution`: Adds an individual Aurea Social solution to the farm.

» `Install-SocialSitesSolution`: Deploys an individual Aurea Social solution to the farm.

» `Remove-SocialSitesSolution`: Retracts and remove an individual Aurea Social solution from the farm.

» `Update-SocialSitesSolution`: Updates an individual Aurea Social solution on the farm.

» `Add-SocialSitesSolutions`: Adds the available Aurea Social solutions to the farm.

» `Install-SocialSitesSolutions`: Deploys the available Aurea Social solutions to the farm.

» `Remove-SocialSitesSolutions`: Retracts and remove the Aurea Social solutions from the farm.

» `Update-SocialSitesSolutions`: Updates the Aurea Social solutions on the farm.

» `Start-SocialSitesWebApplicationPools`: Ensures the IIS web application pools are started for the SharePoint web applications.

» `Copy-SocialSitesWebAplicationsBinContent`: Copies the application bin content to the web applications on each SharePoint server.

» `Disable-SocialSitesWebApplications`: Disables end-user access to the SharePoint web applications.

» `Enable-SocialSitesWebApplications`: Enables end-user access to the SharePoint web applications.

» `Get-SocialSitesAssemblies`: Gets a list of Aurea Social assemblies in the Global Assembly Cache on the local machine.

» `Repair-SocialSitesAssemblies`: Attempts to add the assemblies from each SharePoint solution in the current directory to the **Global Assembly Cache**.

## 1.13 Configuring the Video Stream Encoder

This section provides more details on the encoders supported by Video Stream as described above. It also explains how to configure to support various scenarios.

### Supported encoders

| Encoder | Target Codec |
|---|---|
| Microsoft Expression Encoder 4.0 Free edition | VC1 Progressive Downlaod (non-Smooth Streaming) |
| | VC1 Smooth Stream |
| FFMPEG with xlib264 and qt-faststart.exe | H264 progressive download |

By default, Video Stream uses Smooth Stream encoding for web playback (that is, browser) and progressive H264 encoding for mobile viewing.

### Microsoft Expression Encoder 4.0 Free Edition

As described in the Software Prerequisites for the Encoding Service above, if you wish to do Smooth Streaming or use VC1 as a target codec you need this encoder.

You can get it from: http://www.microsoft.com/en-us/download/details.aspx?id=27870. This encoder is also the default for encoding the thumbnail. Using the FFMPEG encoder for producing the thumbnail is described below.

### Customizing the Smooth Stream transcoding

Starting with 2.6.3, it is possible to specify a customized preset file to use when Microsoft Expression Encoder transcodes a video. For example, you would use a custom preset file if you want to change how many stream gets generated when transcoding to the smooth stream format.

Here are the steps you need to take:

1. Create a preset file using the Microsoft Expression Encoder client application.

2. Place the preset file in the root folder of the Video Stream encoding service.

3. Open the encoding service configuration file. It is located at the root folder of the Video Stream encoding service.

4. Find the entries that have the following format:

```
<addkey="NG.MSExpression.SmoothStreamVC1.{height}.Preset"value=""/>
```

There is an entry for videos that have a height of 1800 or more, 720 to 1079 and one for videos that are less than 720.

5. Add the name of you customized preset file in between the "". Such as

```
<addkey="NG.MSExpression.SmoothStreamVC1.1080.Preset"value="MyPresets.xml"/>
```

```
<addkey="NG.MSExpression.SmoothStreamVC1.720.Preset"value="MyPresets.xml"/>
```

```
<addkey="NG.MSExpression.SmoothStreamVC1.480.Preset"value="MyPresets.xml"/>
```

6. Add a video and it uses the preset file while encoding.

For more information on how to create a preset file from within the Microsoft Expression Encoder, see http://msdn.microsoft.com/en-u

## FFMPEG and QT-FastStart tools

### FFMPEG

As described in the Software Prerequisites for the Encoding Service, if you wish to encode to a portable format that is viewable across a wide range of mobile devices you have to transcode your videos to a H264 codec.

We support this scenario through the use of a widely used command line encoder called FFMPEG (in conjunction with the QT-FastStart).

FFMPEG comes in many flavors; the one we tested against is compiled with an x264 library in it to enable H264 transcoding.

You can get it from:

- 32 Bit: http://ffmpeg.zeranoe.com/builds/win32/static/ffmpeg-20121125-git-26c531c-win32-static.7z
- 64 Bit: http://ffmpeg.zeranoe.com/builds/win64/static/ffmpeg-20121125-git-26c531c-win64-static.7z

### QT-FastStart.exe

Another tool that we use is called `qt-faststart.exe`. This tool makes it so a video can be downloaded using the progressive download technique. You can read about this tool here: You can download the version we use from:

- 32 Bit: http://ffmpeg.zeranoe.com/builds/qt-faststart/win32/qt-faststart-git-91a4abd8-win32.7z
- 64 Bit: http://ffmpeg.zeranoe.com/builds/qt-faststart/win64/qt-faststart-git-91a4abd8-win64.7z

### How to install FFMPEG and QT-FastStart.exe

1. Download both tools from either the 32 or 64 bit version. They are compressed with the 7zip utility you can find at http://www.7-zip.org/.

2. Extract the content of the FFMPEG file.

3. Copy the `ffmpeg.exe` from the bin folder to the root folder of the Video Stream encoding service.

4. Copy the content of the presets folder to a new folder named `ffpresets` at the root folder of the Video Stream encoding service folder.

5. Extract the content of the `QT-FastStart` file.

6. Copy `qt-faststart.exe` to the root folder of the Video Stream encoding service.

> **Note:**
> Unless changed during the installation of the Video Stream additional components, the encoding service should be located at `C:\Program Files (x86)\NewsGator\Video Stream Encoding Service`.

## Other encoding configuration options and the command line encoder

As of Video Stream 2.6.3, a command line encoder can be used for video transcoding. Our use of FFMPEG/QT-FastStart is a kind of reference implementation although we don't actually reference FFMPEG or any other command line tools in our code base. Instead, we call script files that execute the command line encoder.

Below are those files that can be found in the root folder of the Video Stream encoding service:

» **NG.CommandLine.GenerateThumbnail.txt:** This file holds commands to get FFMPEG to generate the thumbnail image for the video.

» **NG.CommandLine.GetVideoInformation.txt:** This file holds commands to call the MediaInfo tool to read duration, bit rate, width and height information from the video file to transcode.

» **NG.CommandLine.PreProcessFile.txt:** This file holds commands that uses FFMPEG to rotate the video back to a vertical position. This works if the source video has rotation metadata in it that can be used to figure out if and how much the video must be rotated.

» **NG.CommandLine.ProgressiveH264.txt:** This file holds commands to transcode the video into an H264 format optimized for viewing in from a video player on a desktop. It also ensures the video can be truly used for progressive download by passing the resulting transcoded video to `qt-faststart.exe`.

» **NG.CommandLine.ProgressiveMobileH264.txt:** This file holds commands to transcode the video into an H264 format optimized for viewing in from a video player on a mobile device. It also ensures the video can be truly used for progressive download by passing the resulting transcoded video to `qt-faststart.exe`.

### Changing encoding settings in the command line encoder

Since all command line encodings are stored in script files it is possible for users to change settings used by the command line encoder.

If you wish to change the commands that are sent to the command line encoder, make a copy of the default script file we provide and change the settings in that new file.

After that, specify the new script file in the encoding service configuration file. If you wish to revert back to the default script, make the setting null and the service uses the script we install by default.

### List of available command line encoder scripts

» NG.CommandLineEncoder.GenerateThumbnail.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service:** `NG.CommandLine.GenerateThumbnail.txt`

**Description:** Runs command to generate the thumbnail that is used to represent the video.

» NG.CommandLineEncoder.PreProcess.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service**: `NG.CommandLine.PreProcessFile.txt`

**Description:** Runs commands before the video is transcoded. The commands we ship with checks if the video is rotated and rotates it back.

» NG.CommandLineEncoder.ProgressiveH264.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service:** `NG.CommandLine.ProgressiveH264.txt`

**Description:** Runs commands to encode to H264 progressive download optimized for viewing in the web player.

» NG.CommandLineEncoder.ProgressiveMobileH264.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service:** `NG.CommandLine.ProgressiveMobileH264.txt`

**Description:** Runs commands to encode to H264 progressive download optimized for viewing on mobile devices.

- NG.CommandLineEncoder.ProgressiveVC1.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service:** `NG.CommandLine.ProgressiveVC1.txt`

**Description:** Runs commands to encode to VC1 progressive download optimized for viewing in the web player.

- NG.CommandLineEncoder.KontikiH264.Script

**Default file used if none specified in the setting. File is located in the root folder of the encoding service:** `NG.CommandLine.ProgressiveH264.txt`

**Description:** Runs commands to encode to H264 progressive download for use with the Kontiki platform.

### Generating thumbnails

Starting with version 2.6.3 of Video Stream you gain a lot more control over thumbnail image generation. You now have 2 options for thumbnail generation.

- **Using Microsoft Expression Encoder:**

Before Video Stream 2.6.3 this was the only option. This remains the default option.

- **Using FFMPEG Command Line Encoder:**

As of 2.6.3, you can use a command line encoder to generate a thumbnail for the video.

### How to switch between the different thumbnail generators

In the config file of the encoding service you find the following entry:

```
<addkey="NG.ThumbnailGenerator"value=""/>
```

When the value of this entry is null, the encoding service uses Microsoft Expression Encoder to generate the thumbnail for the video.

To use a command line encoder script to generate the thumbnail specify the following:

```
<addkey="NG.ThumbnailGenerator"value="NG.CommandLine.ThumbnailGenerator"/>
```

When using the command line thumbnail generator you can also specify via the configuration file at what position in the video you should take the thumbnail. By default, the thumbnail is taken 5 seconds into the video.

For example to get a thumbnail at 7 seconds into a video you would do the following:

```
<addkey="NG.CommandLineEncoder.GenerateThumbnail.Position"value="7"/>
```

### Using Progressive Download instead of Smooth Streaming

Starting with 2.6.3 it is possible to use progressive download instead of Smooth Streaming for video encoding and playback.

### Turning on progressive download

To switch over to progressive download you have to do the following:

1. Download the files required to use FFMPEG and `QT-FastStart.exe`.

2. Go to the **Video Stream properties** page.

a. Set streaming option to **Progressive Download**.

b. All of your existing videos gets re-encoded to the H264 progressive download format.

Since FFMPEG and QT-FastStart are used to encode to the H264 progressive download format, ensure those tools are installed before switching to progressive download.

> **WARNING:**
> If you already have videos encoded in the Smooth Streaming format, they are unavailable until they are all re-encoded to the H264 progressive download format.

## 1.14 Video Stream SharePoint features

Below are the video stream features:

### Farm Level

**Dependency Registration Farm Features**

These features are needed by all parts of VideoStream. These should also be the first features enabled. When activating or deactivating these features you should ALWAYS do an IIS reset and a SharePoint timer restart on all machines in the Farm.

» NewsGator Common Librairies Dependency Registration (Farm)

**Feature ID:** 9860e8e6-ca0a-46db-81bc-fde72cfddca8

» NewsGator VideoStream Dependencies Registration (Farm)

**Feature ID:** 84e3b61d-c2c7-43ac-b7fc-4c90abf99593

**Installer Farm Feature**

This feature is needed to support most of VideoStream's in fracture at the farm level. It registers the VideoStream service application definitions (this allows VideoStream service apps to be created).

» NewsGator VideoStream Module Installer (Farm)

**Feature ID:** a505e6bd-73d6-4da8-9afe-beae73e44184

**Activity Feed Integration Farm Feature**

The feature is needed to play videos (including videos from third party services likes YouTube) in the activity stream.

» NewsGator VideoStream to Activity Feed integration (Farm)

**Feature ID:** 07bf848d-9196-4796-87de-262f473eae3c

### Site Collection Level (SPSite)

**VideoStream Fields**

Adds fields/columns used by all VideoStream sites in the site collection

» NewsGator VideoStream Fields (Site)

**Feature ID:** fa10c93d-3032-4dcc-b1ac-07445c6bbca2

**VideoStream UI**

Adds web parts used by all VideoStream sites in the site collection

» NewsGator VideoStream UI (Site)

**Feature ID:** 282d2872-398a-4652-800f-c7a2069b0964

### Site Level (SPWeb)

**VideoStream UI**

This adds the Video tab, Video Center home page, Video page and the VideoStream asset library to the site. In other words adds video stream support to the community.

- NewsGator VideoStream UI (Web)

**Feature UI:** 5e530211-11cc-4d7f-8c57-7c763f0b2585

## 1.15 Performance testing and sizing of Video Stream

The Video Stream module for Aurea Social provides the ability to upload large videos, discover the most popular ones and view them inline in the activity stream.

Most of the common input video codecs are supported and are encoded to provide an HD viewing experience up to 1080p (depending on quality of video uploaded).

Using Microsoft's Smooth Streaming technology, the individual user's video playing experience is optimized for the current network bandwidth and client performance. Video Stream is an optional module which integrates tightly with, and requires the functionality of, the base Aurea Social product.

#### Target audience

These performance notes are intended for customers who have special performance requirements.

#### Objective

The goal of this performance testing to characterize the performance of Video Stream in 4 key areas:

- Uploading videos
- Encoding videos
- Browsing most liked, most watched and recent videos
- Viewing videos

### 1.15.1 Test environment (Hardware)

**Setting up a test environment.**

#### Server A– SharePoint server, Streaming server and Web Front End

- Dell PowerEdge 2900
- MS Windows Server 2008 R2, Standard Edition
- Microsoft SharePoint 2010
- Processors: Quad Core Intel® Xeon® E5450, 2x6MB Cache, 3.0GHz, 1333MHz FSB
- Memory: 4 GB 667 MHz Dual Ranked DIMMs
- 6 Hard Drives:
- 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 1 array (OS drive)
- 4 x 146 GB 15K RPM Serial-Attach SCSI RAID 5 array (where applicable)

#### Server B – Database server

- Dell PowerEdge 2900
- MS Windows Server 2008 R2 , Enterprise x64 Edition
- Processors: 2 x Quad Core Intel® Xeon® X5450, 2x6MB Cache, 3.0GHz, 1333MHz FSB
- Memory: 8 GB 667 MHz Dual Ranked DIMMs
- MS SQL Server 2008 R2

- 8 Hard Drives:
- 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 1 array (OS drive)
- 2 x 73 GB 15K RPM Serial-Attach SCSI RAID 0 array (Log files)
- 4 x 146 GB 15K RPM Serial-Attach SCSI RAID 5 array (databases)

**Server C – Encoding server**

- VM running with 8 GB, 4 Cores
- MS Windows Server 2008 R2, Enterprise x64 Edition
- .NET Framework 4.0

**Clients**

- Windows 7
- JMeter
- IE 8

**Network**

- 1 GB between servers, 100 MB or 1 GB from client to server depending on test

**Software**

- Social Sites 2.0 with Video Stream 2.0

**Deployment**

**Server A – SharePoint server, Streaming server and Web Front End**

- Windows 2008 R2 x64
- SharePoint Server 2010
- Social Sites 2010 2.0
- Social Sites Video Stream 2.0
- IIS 7.5 with Smooth Streaming Media Extensions

**Server B – Database server**

- Windows 2008 R2 x64
- SQL Server 2008 R2

**Server C – Encoding server**

- Windows 2008 R2 x64
- Microsoft Expression Encoder Pro

**Client**

- Windows 7

### 1.15.2 Test methodology

The objective of this document is to show the performance of Video Stream for 10,000 and 50,000 community members.

Since only a very small subset of users are actually active in the system (and less so for communities versus regular team sites), we are using a concurrency ratio of 1 to 100 for video viewing and browsing (i.e. 100 simultaneously users viewing and browsing represents a community of 10,000 members).

Uploading and encoding is much less at 1 to 500. The concurrency ratio for any given installation may be higher or lower. We used Apache JMeter to monitor test cases for performance results. All tests were run independently.

The test cases include:

- Video viewing test for 10,000 Members with high-quality video
- Video viewing test for 50,000 Members with medium-quality video
- Video Center browsing for 10,000 members
- Encoding performance for 50,000 members
- Video upload performance for 50,000 members

**Test results**

## Video viewing test for 10,000 Members with high-quality video

- Test data
  - 100 simultaneous users watching 10 minute 1080p videos
- System statistics (Server A with 100MBit network)
  - **CPU:** 34%
  - **Network:** < 15%
  - **Disk:** Busy, Utilization 178 read/writes per second
  - **Memory:** Normal, 52%, Top Process: w3wp (450,636KB)
- Requests
  - **GetSecurityToken:** Average - 719ms, Median 716ms
  - **OpenSession:** Average - 521 ms, Median 551ms
  - **GetChunk:** Average 5560ms, Median 4500ms
- Comments
  - No obvious bottle-necks for this number of users.

## Video viewing test for 50,000 members with medium-quality video

- Test data
  - 500 simultaneous users watching 10 minute video at 1.15 Mb/s (good quality at default player size and decent quality at full screen)
- System statistics (Server A with 100MBit network)
  - **CPU:** 11%
  - **Network:** 97%
  - **Disk:** Busy, Utilization 7 read/writes per second
  - **Memory:** Normal, 50%, Top Process: w3wp (450,636KB)
  - **Bytes total/sec:** 121,246,125 (925 Mbit/sec)
- Requests
  - **GetSecurityToken:** Average - 308ms, Median 295ms, 90% line 665ms
  - **OpenSession:** Average - 1008 ms, Median 1119ms, 90% line 1152ms
  - **GetChunk:** Average 236ms, Median 113ms, 90% line 627ms (this is for a medium quality stream 1.15Mbps)

» Comments

- The bottle-neck in this test was the network bandwidth between the streaming server and the video player running in the user's browser. The purpose of this test was to determine how large a community could be supported with a 1 GBit network connection.

> **Note:**
> Due to smooth streaming, the video player automatically adjusts based on network and client availability to maximize the number of users that can watch an uninterrupted video albeit at a lower quality level.
> With 11% CPU usage, ramping up to HD would, understandably, require more network bandwidth.

## Video Center browsing for 10,000 members

» Test data

- 100 simultaneous users browsing a list of 1000 videos using various filters (not including video viewing)

» System statistics (Server A with 100MBit network)

- **CPU:** 76%
- **Network:** 20%
- **Disk:** Normal, Utilization 27 read/writes per second
- **Memory:** 78%

» Page load times

- **Video Center main page:** <1 second, max 2.5 seconds (90th percentile)
- **Pagination on Video Center page:** < 1 second, Max 3.2 seconds (90th percentile)
- **Filters (for example, from "Most Liked", "Most Viewed". "Most Recent"):** 1-2 seconds
- **Individual Video Page:** <3.3 seconds, max 4.5 seconds (90th percentile)

» Comments

- The bottle-neck in this test was the WFE which can be addressed by adding more WFE's – a very robust scaling strategy in SharePoint.

## Encoding performance for 50,000 members

» Test data

- 100 simultaneous users encoding 50 MB videos

» System statistics (Server C with 100 MB network)

- **CPU:** 89%
- **Network:** < 15%
- **Disk:** Idle, Utilization 38 read/writes per second ,
- **Memory:** Normal 41%

» Comments

- Predictably, the CPU is the bottle-neck which is why we recommend running the encoding service on its own server.

## Video upload performance for 50,000 users

» Test data

  - 100 simultaneous users uploading 50 MB files
- System statistics (Server A with a 100 MB network connection to the uploader's browser)
  - **CPU:** 51%
  - **Memory:** 69%, 1917MB Available
  - **Top Process:** w3wp, Private Working Set: 574,812 KB
  - **HDD IO/sec:** 1091 (> 500), Avg. Disk Queue Length. Mean 3, Minimum 1.064, Maximum 9
- Comments
  - Since videos are uploaded in "chunks", this tends to minimize the CPU, memory and network drain.

## 1.15.3 Sizing guidelines

Below are the sizing guidelines:

**Video Stream hardware configurations**

The following configurations are for planning purposes only. Hardware resource requirements can vary dramatically across similar user population sizes.

These configurations, for the most part, reflect scale-out options. While the requirement for both the encoding server and streaming server is proportional to community size, the requirement for separate encoding server is driven by the size of the uploaded video files, frequency of uploading and the encoding-turnaround requirement.

Since the encoding process is CPU and memory intensive, we recommend that the encoding server runs on its own machine.

- Low volume video usage (under 1000 users)
- Streaming Server, Encoding Server on SharePoint Server
- Streaming Server on SharePoint Server, separate Encoding Server
- Medium volume video usage (1000 to 50,000 users)
- Streaming Server running on a load-balanced WFE
- Separate Streaming Server
- Separate Streaming Server and separate Encoding Server
- High volume video usage (+50,000 users)
- Separate Streaming Server and separate Encoding Server (scaled-up from medium case)

**Hardware requirements**

If these servers are running on machines deployed for another purpose, these recommendations are in addition to the resource recommendations required for these components.

- Encoding Server
- 1 GHz or faster processor
- 3 GB of RAM or more
- 2 GB or more of available hard-disk space

For further details, see http://www.microsoft.com/expression/products/EncoderPro_SysRequirements.aspx

» Streaming Server

Smooth streaming is very similar to serving-up static files. For further details on sizing see, http://msdn.microsoft.com/en-us/windows/hardware/gg463392.

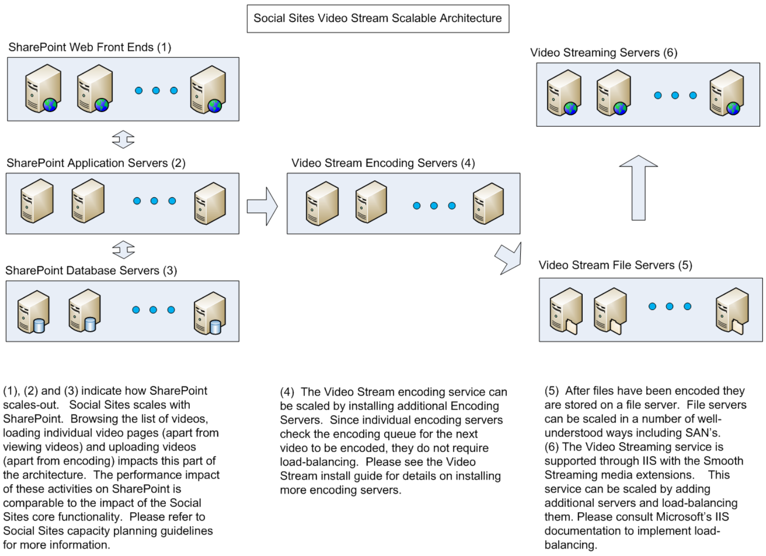
» Network:

As seen in the performance report, network performance is the bottle-neck for video viewing performance. We would recommend the equivalent of 1 Gb from the Streaming Server to the client's network to support concurrent viewing of high bit-rate videos. 100 Mb may be fine for the smaller installs depending on load.

Remember, the advantage of smooth streaming is that it automatically throttles the bit-rate based on network availability and client performance. As an additional safeguard, the IIS Media Extension for Bit Throttling can be used to further manage the amount of network bandwidth used for smooth streaming.

#### Further scaling options

If further scale-out options need to be considered, the diagram below shows all of the components in the overall Social Sites Video Stream architecture that can considered (depending on where the bottlenecks are):




*Screenshot 31: Social sites video stream scalable architecture*

## 1.15.4 Aurea Social Video Stream 5.0 Integration with Kontiki

#### 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.

When integrated with Kontiki, Video Stream continues to encode the uploaded video files but leverages the storage and streaming infrastructure of 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 as the storage and streaming mechanism for Video Stream. For the end-user, the Video Stream experience is the same as using the Video Stream native option.

For the administrator, the Kontiki integration capability deploys as a SharePoint feature.

#### 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 Aurea Social5.0 and Aurea Social Video Stream 5.0. 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 Aurea Social installer or the Video Stream Additional Components installer can be ignored. IIS and the Smooth Streaming Extensions for IIS is not required.

The Kontiki Integration uses the Microsoft Expression Encoder by default and so following the steps and filling entries related to streaming is critical. As of 3.0.2, you can use the free version of the Expression Encoder and it encodes to VC1.

If you have licenses to the Pro version, you can encode videos to H264 instead but the encoding service needs to be configured accordingly by changing the UseH264 parameter to "True":

```
<settingname="UseH264"serializeAs="String">
<value>False</value>
</setting>
```

Other encoders can be substituted programmatically. See the Newsgator Aurea Social Video Stream 5.0 Third-party Video Solution Integration Guide for more details on how to integrate other encoders.

The Kontiki Integration feature requires the Kontiki client to be installed on any machine that views videos. If the Kontiki client is not installed on the user's machines they cannot view videos.

> **Important**
> Make sure you have a Kontiki user account with connector access allowing you to use the Kontiki publishing web service endpoint.

**Below are the steps:**

### Step 1 – Configure SharePoint to trust the digicert root certificate used by the Kontiki publisher web service

Integration with Kontiki is done through a web service 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 needs to be done manually. You can use STSADM to load this solution file into your SharePoint installation.

Here is an example of the STSADM command that loads the solution file into SharePoint:

```
STSADM –o addsolution –filename .\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 is available. This feature is called **NewsGator VideoStream Integration With Kontiki**

**(Farm)**. Activating this feature turns on Kontiki integration. vgv

The VideoStream module now uses Kontiki to store and stream videos.

> **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 appears on the manage page for the VideoStream module.

This option takes you to a Kontiki properties page where you can configure the connection with the Kontiki Publishing web service.

Fields on the properties page:

» **Time Zone Code:** The time zone code of the server that hosts the "NewsGator VideoStream Management" timer job. That job uploads videos to Kontiki.

» **Kontiki Publisher Web Service URL:** The URL to the Kontiki publisher web service.

» **Kontiki User Account:** Your user account WITH CONNECTOR ACCESS to the Kontiki Publisher web service.

» **Kontiki Password:** Your password to get access to the Kontiki Publisher web service.

» **Time in milliseconds the Kontiki Publisher Service waits for an upload to complete (-1 = waits for ever):** The time in milliseconds the connection to the Publisher web service is kept alive while an upload is happening. If you want the connection to stay alive forever and never time out set it to -1.

» **Kontiki Client Port Number:** The port number the Kontiki clients are configured to listen on in your environment.

### Switching back to Video Stream native mode from Kontiki Integration mode

To switch back to Video Stream native mode, deactivate the `NewsGator VideoStream Integration With Kontiki (Farm)` in **Central Administration/Manage Farm** features. After that, install the streaming server as described above.

## 1.16 Capacity planning

**Meeting load requirements**

NewsGator believes customers should size the SharePoint Server which will be running the User Profile Service Application (and the NewsGator managed service) at 25% above the projected sizing based on the profile service by itself. Size web front ends to account for 30% to 100% more load than with SharePoint alone, based on the number of web front ends in your SharePoint environment, according to the chart below.

For further details see, Aurea Social - Testing Procedure and Results Used to Establish Capacity Guidelines.

| Number of WFEs | 1 | 2 | 3+ |
|---|---|---|---|
| % sizing increase suggested to run Social Sites | 100% | 50% | 30% |

Alternatively, if you don't have extra capacity in your web front ends to handle additional load and will be adding similar-capacity web front ends, you should add about 45% to your number of WFE's from your base sizing to retain the same performance. In NewsGator's tests, the database server is not seeing significant pressure.

**Note:**
As you add web front ends without adding application servers, your application server(s) may become your bottleneck, however based on NewsGator testing this only happens if you have far more WFE's than you do application servers (with two WFE's and one application server, the WFE's are still the bottleneck).

### Meeting storage requirements

NewsGator suggests planning for Social Sites's databases to require an amount of storage per user for every 180 days of data retained in the database, in accordance with the charts below.

So, for example, if set to retain 720 days = 180 days x 4 of social data, and your Social Sites users are very active in Social Sites (add a relatively large amount of content it it) you would want to allot 0.25 MB x 4 = 1.0 MB of storage per user with an active SharePoint profile in your system.

If you have a good idea of how many of your users are actively contributing to Social Sites (the NewsGator licensing information page in Central Administration gives you an idea of this), you may prefer to use the numbers in the first row instead, meaning, for our example, you would allot 1.10 MB x 4 = 4.40 MB per active user of Social Sites. NewsGator recommends using both calculation methods for each database, and using the larger result.

Actual storage required in practice may vary for you, depending on how actively your user base uses Social Sites.

| NewsGator social database | | |
|---|---|---|
| Calculation method | Less active user base | More active user base |
| MB per user that actively contributes to Social Sites | 0.03 | 1.10 |
| MB per user with an active SharePoint profile | 0.01 | 0.25 |

| NewsGator Reporting Database | | |
|---|---|---|
| Calculation method | Less active user base | More active user base |
| MB per user that actively contributes to Social Sites | 0.002 | 0.100 |
| MB per user with an active SharePoint profile | 0.001 | 0.030 |

| NewsGator News Manager Database | | |
|---|---|---|
| Calculation method | Less active user base | More active user base |
| MB per user that actively contributes to Social Sites | 0.0 | 2.0 |
| MB per user with an active SharePoint profile | 0.0 | 0.5 |

## 1.17 Configuration planning for video stream

There are two parts to the Video Stream installation process. The first part is part of the regular Social Sites installation where Video Stream module is selected.

The second part of the installation installs the actual encoding and streaming servers and is described below in the Video Stream Additional Components Installation section.

This section explains the different components of Video Stream and the various parameters to be configured.

Video Stream consists of 3 major parts:

- Server(s) running SharePoint and Social Sites with the Video Stream module installed
- Video Encoding Service (outside of SharePoint)

- Streaming Service (outside of SharePoint)

Each of these components can be installed all on one server or each component can be deployed on separate servers.

For more sizing guidance for more demanding environments, see Performance Testing and Sizing of Video Stream.

For further details, see Instructions regarding Video Stream and Enrich Upgrades.

### Video Stream module parameters

This section describes those configuration parameters shared by the **Social Sites installer** and the **Video Stream Additional Components** installer.

| Component | Parameter | Allowed Values | Purpose |
|---|---|---|---|
| Video Stream SharePoint Module | Database Server | Server hostname | Name of the server that will host the Video Stream database. |
| Video Stream SharePoint Module | Database Name | Database name | Name of the Video Stream database. |
| Video Encoding Service | Folders for videos waiting to be encoded (aka Video Encoding Service input directory) | A local or UNC (windows file share) style path | Folder where the SharePoint Video Stream job will copy videos waiting to be encoded. The Video Encoding Service retrieves videos waiting to be encoded from this folder. |
| Video Encoding Service | Folders for videos that were encoded (aka Video Encoding Service output directory) | A local or UNC (windows file share) style path | Folder where the Video Encoding service will encode videos to. The SharePoint Video Stream job copies videos to the Streaming Server from this folder. |
| Streaming Service | Streaming server folder to store videos (aka Streaming Directory) | A local or UNC (windows file share) style path | Folder where the SharePoint Video Stream job will copy encoded videos. Must be the root directory or a sub directory of the Streaming Service directory. For planning purposes note that this folder will store video smooth stream content for the entire farm. |
| Streaming Service | Streaming Server Address | A URL | The address of the website created for the streaming service.<br>This address must be either a different hostname or a different port number from SharePoint. |
| Video Stream SharePoint Module | Upload Folder | A local or UNC (windows file share) style path | Directory used by the Video Stream Large File Uploader to store file fragments during the uploading process. |

## 1.17.1 Steps before installing video stream

The Encoding Service and Streaming Server are two separate components that work together with the Video Stream module installed into Social Sites. They are distributed within an installer that is separate from the Social Sites installer. Neither of these two components requires SharePoint to be installed on the same server.

It is advisable to install the Encoding Service on a server separate from the SharePoint farm. The Encoding Service has high CPU usage which could interrupt service to any other applications hosted on the same server.

The Streaming Server can be installed onto a dedicated streaming server or a SharePoint server.

#### Video Encoding service

The Encoding Service requires an input and output folder. See Video Stream Module Parameters in the previous section for more information. The folder reference to use in the Social Sites Installer varies depending on where the Encoding Service is installed.

If the SharePoint farm consists of only one server and the Encoding Service is installed on this same server, then a local file path can be used for the Encoding Server's input and output folders.

However, in all other scenarios, the input and output folder must be a UNC style path (a Windows File Share).

The SharePoint farm account needs to have read/write access to the folders (and optional file shares). The account used by the Encoding Service also needs read/write access to the directories and have dbowner role on the Video Stream database.

It is best to have the server hosting the Encoding Server to also host the Encoding Service file shares. However, this is not a requirement.

At the moment Video Stream does not support multiple encoding servers.

If you have special encoding requirements, see Configuring the Video Stream Encoder.

> **Important:**
> In all scenarios, the folders and the optional file shares need to be created before running the Video Stream Additional Components installer.

#### Streaming service

The Streaming Service uses IIS Media Services to smooth stream video content to the SilverLight video player. The video content must be stored on a local folder on the server hosting the Streaming Service. The folder to reference in the Social Sites Installer varies depending on where the Streaming Service is installed.

If the SharePoint farm consists of only one server and the Streaming Service is installed on this same server, then a local file path can be used for the Streaming Server's Streaming Directory (in the Social Sites installer).

However, in all other scenarios, the Streaming Directory must be a UNC style path (a Windows File Share) in the Social Sites installer.

The SharePoint farm account needs to have read/write access to the folder (and optional file share).

> **Important:**
> In all scenarios, the folder and the optional file share need to be created before running the Video Stream Additional Components installer.

## 1.17.2 Scaling video stream

#### Single server

Video Stream can be deployed beside SharePoint with all components installed on the same server. This is a viable option for small deployments, test servers or deployments with a low number of videos uploaded per day.

#### Separate from SharePoint

When encoding videos the Encoding Service component can slow down a SharePoint deployment on the same machine.

It is recommended that the Encoding Service component be installed on a dedicated server. The more processing power added to this server decreases the amount of time a video takes to get encoded and allows more than one video to be encoded at one time.

When the encoding service is on a separate server, the encoding service machine makes 2 Windows Shares available to receive videos waiting for encoding and to provide encoded videos once they have been encoded.

The server should have theses minimum specs:

Microsoft® Windows Server 2008 or 2008 R2 operating system

- 1 GHz or faster processor
- 1 GB of RAM or more
- 2 GB or more of available hard-disk space
- .NET Framework 4.0

In this configuration the Streaming Server component is installed alongside SharePoint. The Streaming Server has minimal impact on the SharePoint install as the Streaming Server is only serving up static files.

#### All Components on Separate Servers

Video Stream can be scaled by moving each of Video Stream's components onto dedicated servers.

This ensures that encoding of videos and watching videos has no impact on SharePoint performance.

The streaming server should have these minimum specs:

- Microsoft® Windows Server 2008 or 2008 R2 operating system
- 1 GHz or faster processor
- 1 GB of RAM or more
- 2 GB or more of available hard-disk space
- .NET Framework 3.5 SP1

When the Streaming Server is deployed on a separate server from SharePoint, the Streaming Server machine makes a Windows Shares available to receive smooth stream content.

## 1.18 Account/permissions prerequisites

A. The account running the NewsGator Social Platform service application needs to be a farm administrator. Otherwise there will be numerous farm properties and persisted objects that it will not be able to update. See the section Managed Service Application App Pool under Installing or Repairing Social Sites for more details.

B. When installing, upgrading, repairing, or uninstalling Social Sites you must use an account that meets the following pre-requisites, all of which are verified for you on the prerequisite check screen of the installer:

- The account must be an administrator of the server on which hosts SharePoint 2010's Central Administration site.
- The account must be a farm administrator in SharePoint.
- The account must be an administrator of the User Profile Service Application, with full control.
- The account must have sharing permissions to the User Profile Service Application, with full control (this is a distinct setting the one just above).

The settings for the latter two of these can be found by going to the **Application Management** area in SharePoint Central Administration and by clicking the **Manage Service Applications** link, then selecting the User Profile Service Application.

For further details on setting these permissions and the farm administrator permission, see Setting up your account with the SharePoint permissions that are needed to install Social Sites .

## 1.19 Things to gather and choices to make before installing

Before you begin installing Social Sites:

### A. License key

A. You must have a license key provided to you by NewsGator support. It is most convenient to store this license key on the SharePoint Central Administration server before you begin.

### B. Acquire installation files

You must acquire installation files from NewsGator. The WSPs for each module to be installed has to be added to the Solutions folder before you can install.

For full details on what WSPs you'll need, see Validating Setup Folder section in Steps before installing, upgrading, or repairing social sites.

> **Important:**
> When upgrading a Social Sites installation that already includes some modules, those modules must be upgraded at the same time as the Social Sites core. You cannot upgrade the modules later, and the upgraded Social Sites core is incompatible with the older, non-upgraded modules.

### C. Know your web front ends servers

You need to know which servers in your farm are serving as web front ends. This is so that you can stop the NewsGator "Services on Server" on each of them once installation is complete, via Central Administration. This is necessary to have them behaving as true web front ends. (These services are called "NewsGator Social Application Services" and "NewsGator Social Platform Services v2".)

### D. Backup the NewsGator database, if required

If upgrading from a previous version of Social Sites, NewsGator recommends at a minimum that you back up the NewsGator databases first (a better option is to back up SharePoint as described in the section Backing Up SharePoint, below).

To prevent interaction occurring with these databases while they are backed up, deactivate NewsGator jobs and stop NewsGator services first.

Detailed steps for doing this are as follows:

**Step 1: Deactivate all NG jobs farm features:**

1. From **Central Administration**, click **Manage farm features** (in the System Settings section).

2. Deactivate the **NewsGator Jobs Feature**. This shuts off the core NewsGator jobs.

3. If they exist, deactivate the **NewsGator Knowledge Explorer Jobs** feature and the **NewsGator News Stream Jobs** feature. (Do not deactivate the **NewsGator Social Service Installer** or **NewsGator News Stream Installer** features.)

4. From **Central Administration**, click **Check job status** (in the Monitoring section)

5. In the left navigation, click **Job Definitions**.

6. Open up any remaining NewsGator jobs listed here, and disable each.

**Step 2: Stop NewsGator services:**

1. From **Central Administration**, click "**Manage services on server**" (in the System Settings section)

2. Stop all NewsGator services.

**Step 3: Backup NG databases**

### E. Enable user profile application to support NetBIOS, if required

If your NetBIOS name is different from the fully-qualified domain name (FQDN), your SharePoint 2010 installation has some problems, and Social Sites has difficulty installing, unless you enable the **User Profile Service Application** to support NetBIOS name resolution. For further details, see SharePoint 2010 Communities FAQ for more details.

At this time it is unknown whether this same problem occurs with SharePoint 2013.

The following PowerShell script enables NetBIOS name resolution on the Service Application:

```
$USPA = Get-SPServiceApplication –Id <GUID of User Profile Service Application>
$USPA.NetBIOSDomainNamesEnabled=1
$USPA.Update()
```

### F. Preliminary steps for optional video module

If you are installing the optional Video Module, there are some preliminary steps you'll need to take before running the installer, including choosing a video server, choosing the location of the Video Stream module database, and choosing locations for the Video Stream services to use for storing videos in different stages of the encoding process.

Specific items of information you'll need to proceed with running the Social Sites installer are:

- Video Stream database server
- Video Stream database name
- Folder to store videos waiting to be encoded
- Folder to store videos upon completion of encoding
- Folder from which to stream completed videos
- Folder to store uploaded files
- URL for the streaming server

For more detail on making these entries, see the Module Options screen section.

### G. Installing on multi-farm environment

If you are installing in a multi-farm environment, you must choose one farm to be the parent farm on which all services run. The remaining farms are child farms.

Advice on how to choose a farm to be the parent, and instructions on how to set up these roles, are contained in the topic Installing to a multi-farm environment. There you can also find steps to take during and after installation of Social Sites to a multi-farm environment.

## 1.20 Notes on installing to Sharepoint 2013

Below are the prerequisites if you want to upgrade to Sharepoint 2013:

### Upgrading from SharePoint 2010

If you are planning to upgrade from SharePoint 2010 with Social Sites to SharePoint 2013 with Social Sites, please inform your technical contact at NewsGator.

NewsGator has a tested set of steps for completing this process successfully, but given the wide variety of possible configurations on which this process could be done, we would like to work closely with the first organizations to go through this process to assure it goes well.

The instructions in this document are for “fresh” installs to SharePoint 2013, not for upgrades.

For more details about granting rights in Sharepoint 2010, see Setting up your account with the SharePoint permissions that are needed to install Aurea Social.

### Upgrading Enrich or Video Stream from SharePoint 2010 to 2013

Before upgrading Enrich or Video Stream to 2013, make sure:

- That Aurea Social including Enrich or Video Stream has been upgraded to 4.5.
- That Aurea Social has been upgraded to SharePoint 2013 (by upgrading the site collections).

To upgrade Enrich or Video Stream to 2013, activate the Video Stream and Enrich 2010 to 2013 site collection feature:

Go to **Settings -> Site Collection Administration -> Site collection features**.

- Activate the "NewsGator Video Stream, Video Scenarios and Knowledge Base upgrade from 2010 to 2013" feature.

## SSL Alternate Access Mapping required for 2013

For Social Sites to interact with SharePoint 2013 Social Features, an SSL (HTTPS) alternate access mapping must exist for each content web application (the web applications where you have NewsGator integration, including where the main "Social" newsfeed runs).

Users are not required to use this alternate access mapping, it is only required for Social Sites to communicate with SharePoint 2013 on the server side.

However, when NewsGator releases the Office 365 SkyDrive Pro integration, end-users need to be able to access at least one of the web applications via SSL (HTTPS) to connect to Office 365.

Without an SSL (HTTPS) alternate access mapping, certain social features is unavailable to the end-users on SharePoint 2013. In addition, there will be Event Log and ULS error entries.

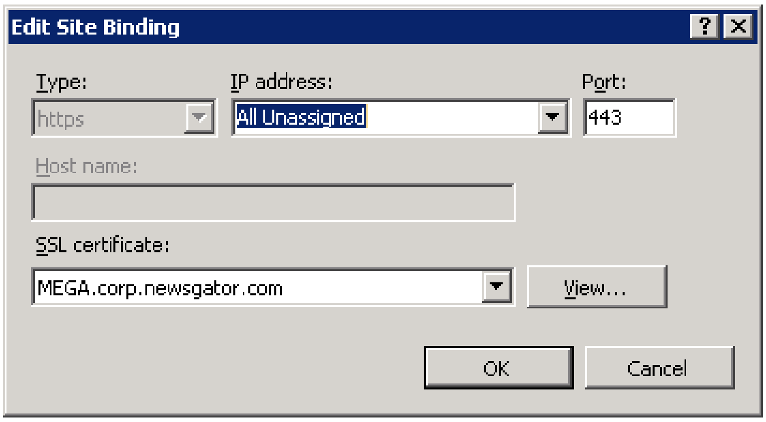
### Setting it up

This can be set up either prior to or after installation.

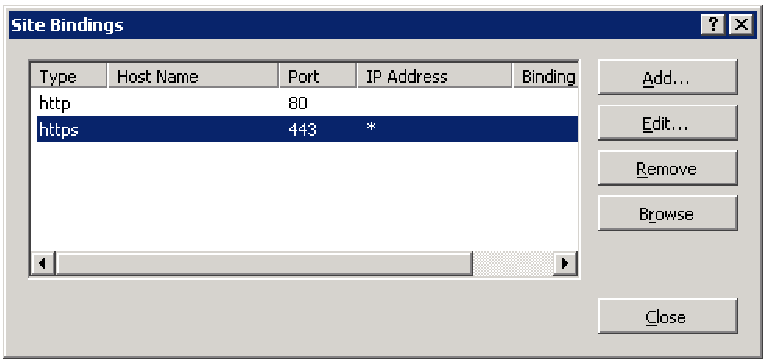
If SSL (HTTPS) is not going to be used by the end-users, a domain SSL certificate will suffice (rather than buying one from a vendor). TechNet has documentation on creating a domain certificate: `http://technet.microsoft.com/en-us/library/cc731014(v=WS.10).aspx`

After the domain certificate is created, an HTTPS binding needs to be added in IIS to each content web application using this certificate. TechNet has some documentation on that as well: `http://technet.microsoft.com/en-us/library/cc731692(v=WS.10).aspx`

To do this, you may need to manually add an SSL certificate to the IIS servers using the Bindings configurations:



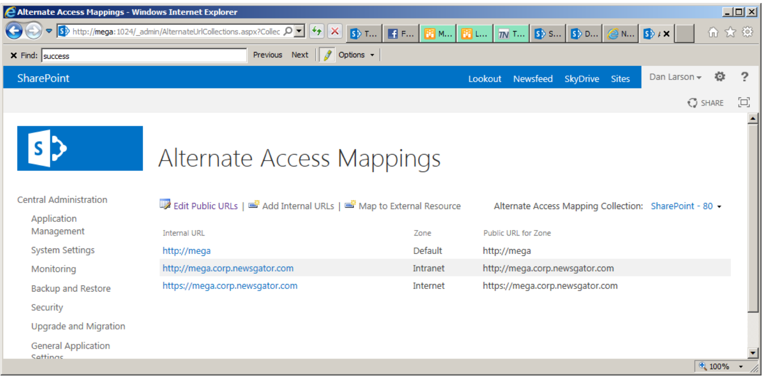

*Screenshot 32: Edit site binding*




*Screenshot 33: Site bindings*

Once SSL is enabled, go to **Central Administration > System Settings > Alternate Access Mapping**s and ensure there is an AAM mapping for the SSL entry. Internally, Social Sites code that uses the SharePoint Object Model requires this SSL to read from SharePoint's social data stores.

For example, the following screenshot demonstrates the AAM mapping for the site `http://mega`:




*Screenshot 34: Alternate access mapping*

## 1.21 Notes on installing to Sharepoint 2016

Below are the prerequisites if you want to upgrade to Sharepoint 2016:

### Upgrading from SharePoint 2010 or SharePoint 2013

If you are planning to upgrade from SharePoint 2010 or SharePoint 2013 with Aurea Social to SharePoint 2016 with Aurea Social, please inform your technical contact at Aurea.

In addition, Microsoft requires that SharePoint 2010 be migrated to SharePoint 2013, prior to upgrading to SharePoint 2016. Aurea has a tested set of steps for completing this process successfully, but given the wide variety of possible configurations on which this process could be done, we would like to work closely with the first organizations to go through this process to assure it goes well.

The instructions in this document are for "fresh" installs to SharePoint 2016, not for upgrades.

For more details about granting rights in Sharepoint 2010, see Setting up your account with the SharePoint permissions that are needed to install Aurea Social.

Aurea Social v5.3 or higher must be installed prior to upgrading to SharePoint 2016.

### SharePoint 2016 and Aurea Social Version Compatibility

Aurea Social v5.3 or higher is supported for installation on SharePoint 2016.

### SharePoint 2016 and Aurea Social Feature Support

All of the product features applicable to SharePoint 2013 are supported for SharePoint 2016. A suite navigation provider has been added to use the same SP2013 suite links configuration.

> **NOTE:**
> Microsoft has deprecated the "tags and notes" feature in SP2016. Based on testing, we haven't seen any issues with Aurea Social features which rely on the "tags and notes" infrastructure, but we don't recommend that you use these features in SP2016 based on Microsoft's direction.

### SharePoint 2016 Min Role and Aurea Social

SharePoint 2016 has some changes to the roles servers perform. If a farm level service is enabled (that is, "NewsGator Social Platform Services (Proxy Components, required on all farms)"), then each of the supporting server-level services are required to run on each of servers in the compatible role.

This basically means that when Aurea Social is installed, the services are required to run on all "Application" or "SingleServerFarm" servers in order to be compliant with the MinRole. The "NewsGator Social Platform Service" is not going to run on "WebFrontEnd", "DistributedCache", or "Search" servers.

When a required service is disabled, there will be a link to Fix or Start the service. You no longer have the option to "stop" services that are required.

### SharePoint 2016 and Microsoft Identity Manager

SharePoint 2016 no longer relies on Forefront Identity Manager to sync user profile information. Instead, it uses the stand alone Microsoft Identity Manager. Although this does not impact Aurea Social functionality, it is important to note the change.

» For more information on installing Microsoft Identity Manager (MIM), see Install Microsoft Identity Manager for User Profiles in SharePoint Servers 2016 and 2019.

» For more information on deploying MIM for SharePoint 2016 User Profile sync, see Use a sample MIM solution in SharePoint Servers 2016 and 2019.

### SSL Alternate Access Mapping required for 2016

Similar for SharePoint 2013, in order for Aurea Social to interact with SharePoint 2016 Social Features, an SSL (HTTPS) alternate access mapping must exist for each content web application (the web applications where you will have NewsGator integration, including where the main "Social" newsfeed runs).

For further details, see the SSL section under Notes for Installing to SharePoint 2013.

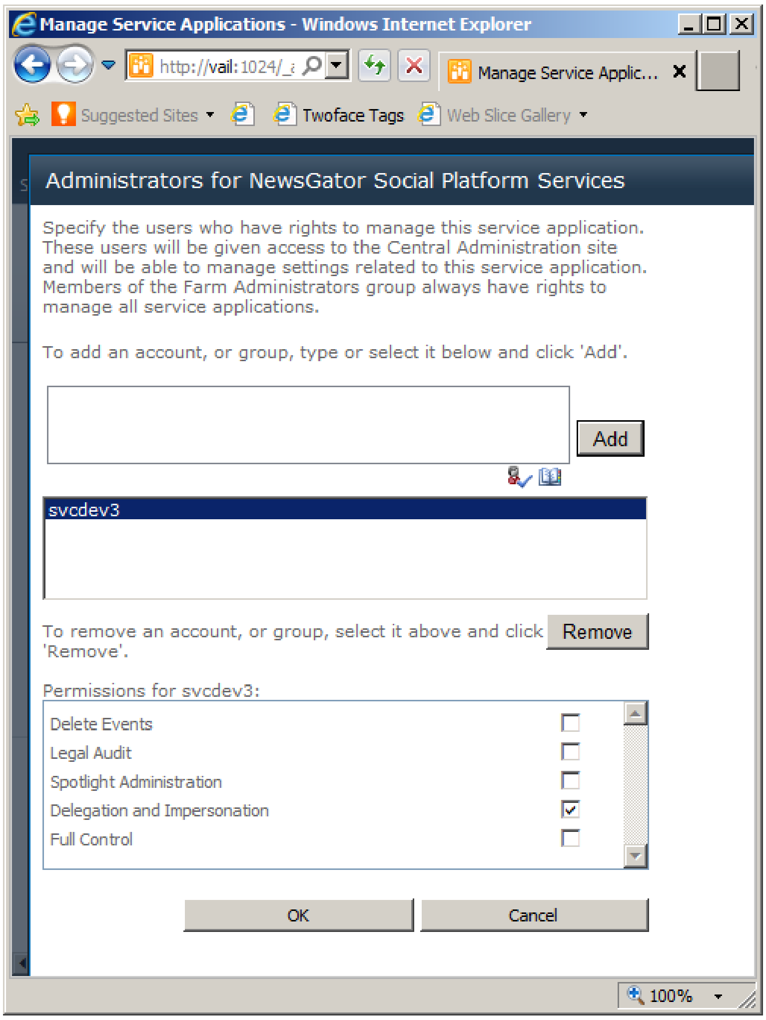
## 1.22 Installing to a multi-farm Sharepoint environment

Beginning with Social Sites v2.0, multi-farm SharePoint environments are supported. When installing to a multi-farm environment, the installer needs to be run once on each farm.

However, you need to choose one farm as the "parent" farm on which NewsGator services runs. The preferable choice for the parent farm is the farm running the main User Profile Service Application.

### Grant service accounts rights on the NewsGator Social Platform service

All service accounts on the consuming farms (web app pool and timer job accounts) need to have the "Delegation and Impersonation" rights granted on the NG service app in the Enterprise Service Farm:




*Screenshot 35: Administrators for NewsGator Social platform Service*

## Most services should not be provisioned to child farms

The instructions in this section is repeated in the Service Applications screen instructions, and in the post-install instructions, both below.

In versions 4.5 and later, run the installer, select advance options, select advance options again and use the "Install or Upgrade on a Consuming Farm" switch when installing on a child farm. There are a couple of important requirements for child farms to successfully connect.

**The child farm needs connect permissions to the service application of the parent farm.**

1. On the child farm, get the farm id. You can use the following powershell:

```
(Get-SPFarm).Id
```

2. On the parent farm, go to Central Administration->Application Management->Manage Service Applications.

3. Select the service application you are trying to connect to.

4. Click on **Permissions** in the ribbon.

5. Add the farm id from step 1.

6. Give it Full Control.

**The service application's farm feature needs to be activated on the child farm.**

1. On the child farm, go to **Central Administration->System Settings->Manage Farm Features**.

2. Activate the appropriate Installer farm feature.

### Connect to services on Enterprise Service Farm

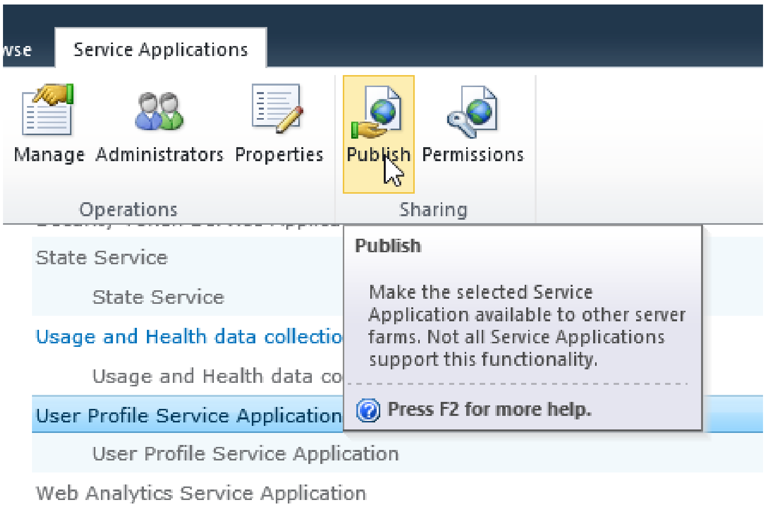
After installation is complete, child farms must be connected to the NewsGator Social Platform Service on the parent farm. For installations with the News Stream module and/or the Enrich module, they must additionally connect to the parent farm's NewsGator News Stream Service and/or Enrich Service. This is a two-step process that consists of

1. publishing the services from the parent farm

2. connecting to the services from each child farm

For detailed instructions on performing these steps, see Connecting Child Farms to NewsGator Services on the Parent Farm.

Additionally, SharePoint's **User Profile Service Application** on the Enterprise Service Farm must be published from the Manage Service Applications page in Central Administration, as pictured here. Because this is a SharePoint service application, this step may be done either before or after installation of Social Sites.




*Screenshot 36: Service Applications*

### Stop NewsGator Social Application Services on child farms

After installing, you'll want to stop **NewsGator Social Application Services** in the list of services on server, for all servers in all child farms, because the platform service won't be running on the child farms.

> **Important**
> You should never uninstall Social Sites and reinstall when your intention is to upgrade Social Sites. Doing so causes damage to your existing communities that can prove very difficult to repair. Use the upgrade option instead.

## 1.23 When to upgrade, repair, or uninstall

When you have a full, functioning installation of Social Sites that you would like to upgrade to a newer version, use the Upgrade and Install option without first performing an uninstall.

Not all setup options that are available when performing a new install of Social Sites will be available during upgrade.

If you need to change options that are not presented during upgrade, see Social Sites install settings you can change via SharePoint Central Administration, for a list of Setup settings that can be changed without running Setup again.

# 1.24 Steps before installing, upgrading, or repairing social sites

When installing, upgrading, or repairing Social Sites, the first steps are all the same, and are as follows:

**Important:**

Please ensure that Anti-Virus software is disabled during the installation of Social Sites.

**Note:**

When upgrading a Social Sites installation that already includes some modules, those modules must be upgraded at the same time as the Social Sites core.

You cannot upgrade the modules later, and the upgraded Social Sites core is incompatible with the older, non-upgraded modules.

## Backing up SharePoint

All production deployments of Microsoft SharePoint should include a backup or other disaster recovery mechanism. When making changes to the SharePoint farm, such as installing new updates or software, it is imperative to have a mechanism that allows the farm to be reverted to a working state if something goes wrong.

This includes installing, updating, and uninstalling Windows Updates, service packs, cumulative updates, and Social Sites.

Before you install, update, or uninstall Social Sites on your production SharePoint farm, we strongly urge you to backup your farm so that it can be reverted in the case something does go wrong.

Microsoft has provided detailed documentation about various SharePoint backup methods on TechNet.

- Backup Solutions in SharePoint 2013: http://technet.microsoft.com/en-us/library/ee428315.aspx
- Backup SharePoint Server 2010: http://technet.microsoft.com/en-us/library/ee428315(v=office.14).aspx

## Validating setup folder

When you purchase Social Sites, NewsGator provides you with a Setup folder containing your installation files. It should have a file called Setup.exe in it. It should also contain a folder within it called "Solutions".

This folder must contain a WSP file, or set of WSP files, corresponding to every optional module you purchased for install, in addition to the WSP's for the core product. If these files do not already appear in the Solutions folder and are delivered to you separately, you have to put copies of them in the Solutions folder before launching Setup.

You'll most likely have the WSPs for each separate module in their own ZIP file. The installer requires all these WSPs to have the same major version, so make sure you get versions of the module ZIP files that match the version of the core product that you are installing.

The core WSP's are as follows:

**Aurea Social 2010 core WSP's**

- NewsGator.Communities.wsp
- NewsGator.Core.Application.wsp
- NewsGator.Core.wsp
- NewsGator.PVModule.wsp
- NewsGator.SiteDefinitions.wsp
- SharePoint.Ajax.Library.wsp

**Aurea Social 2013 core WSP's**

All Aurea Social 2010 core WSP's in the list above, plus:

- NewsGator.Application15.wsp
- NewsGator.Core.Fifteen.wsp
- NewsGator.SiteDefinitions.15.wsp

Below is the list of additional WSP files you need if you also have an optional module or solution. If you have purchased the following module then ensure these file are in the "Solutions" folder before install:

## News Stream module

**Files in "solution" folder:**

```
NewsGator.NewsManager.wspNewsGator.NewsManager.Application.wsp
```

## Idea Stream module

**Files in "solution" folder:**

```
NewsGator.Social.IdeaModule.Sites.wsp
 NewsGator.Social.IdeaModule.wsp
```

```
NewsGator.IdeaModule.Fifteen.wsp
```

## Spotlight module

**Files in "solution" folder:**

```
NewsGator.Social.Spotlight.wspNewsGator.Social.Spotlight.Application.wsp
```

## Video Stream module

**Files in "solution" folder:**

```
NewsGator.CA.CommonAssemblies.App.wsp  NewsGator.CA.CommonAssemblies.UI.wsp
```

```
  NewsGator.ScreenCast.ClickOnceDeployment.wsp
  (optional)
```

```
NewsGator.VideoStream.App.wsp  NewsGator.VideoStream.UI.wsp
 NewsGator.CA.CommonAssemblies.App.SP2013.wsp
```

```
NewsGator.VideoStream.UI.SP2013.wsp
```

```
NewsGator.VideoStream.App.SP2013.wsp
```

## Video Stream module with Kontiki support

**Files in "solution" folder:**

```
NewsGator.VideoStream.KontikiIntegration.wsp
```

(additionally, the Video Stream module WSPs must be included)

## Enrich module (without video scenarios)

**Files in "solution" folder:**

```
NewsGat-
or.CA.Com-
monAssemblies.App.wspNewsGator.CA.CommonAssemblies.UI.wspNewsGator.LearningPoint.

App.wspNewsGator.LearningPoint.UI.wsp
```

```
NewsGator.LearningPoint.App.SP2013.wsp
```

NewsGator.LearningPoint.UI.SP2013.wsp

### Enrich module (with video scenarios)

**Files in "solution" folder:**

```
NewsGator.Learning.VideoScenarios.App.wsp
 NewsGator.Learning.VideoScenarios.UI.wsp
 NewsGator.Learning.VideoScenarios.App.SP2013.wsp
```

```
NewsGator.Learning.VideoScenarios.UI.SP2013.wsp
```

(additionally, the Video Stream module WSPs and Enrich module WSPs must be included)

### Innovation Solution

**Files in "solution" folder:**

```
NewsGator.CA.CommonAssemblies.App.wsp  NewsGator.CA.CommonAssemblies.UI.wsp
```

```
NewsGator.CA.CommonAssemblies.App.2013.wsp  NewsGator.CA.CommonAssemblies.2013.wsp
```

```
Newsgator.Innovation.App.wsp
  Newsgator.Innovation.SiteDefinitions.wsp
  Newsgator.Innovation.UI.wsp
```

(additionally, the Idea Stream module WSPs must be included)

### iComm solution

**Files in "solution" folder:**

```
Newsgator.corpcomm.application.wsp
  Newsgator.corpcomm.sitedefinitions.wsp
  Newsgator.corpcomm.wsp
```

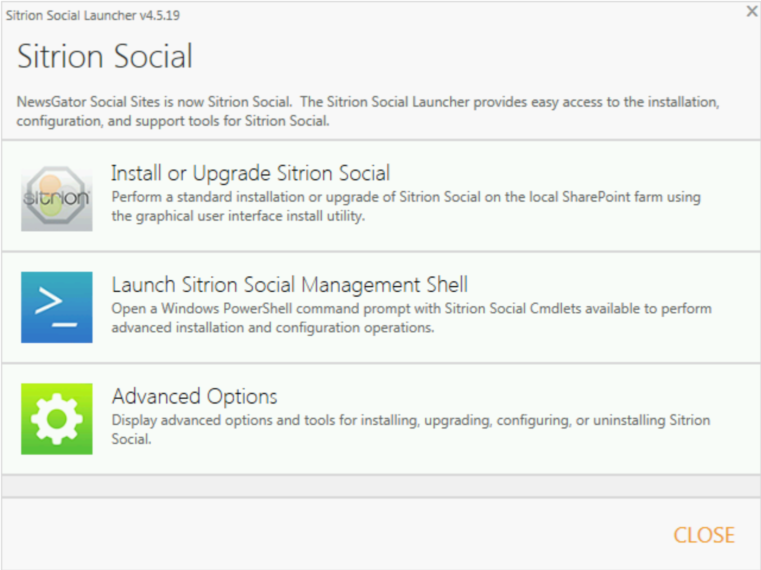
Be sure to check permissions on the install files, as downloaded or unzipped files sometimes have restricted permissions which cause a failed install.

> **Important**
> If you are installing/upgrading both the Enrich and Video Stream Modules please ensure that the WSPs are from the same version.

## Opening the Launcher

Log in to your Applications server (usually the same as your Central Administration server, but not necessarily the same) using an account that meets the pre-requisites listed in part B of the section Account/Permissions Prerequisites, and launch Launcher.exe from the Aurea Social Setup folder provided to you by NewsGator Support.

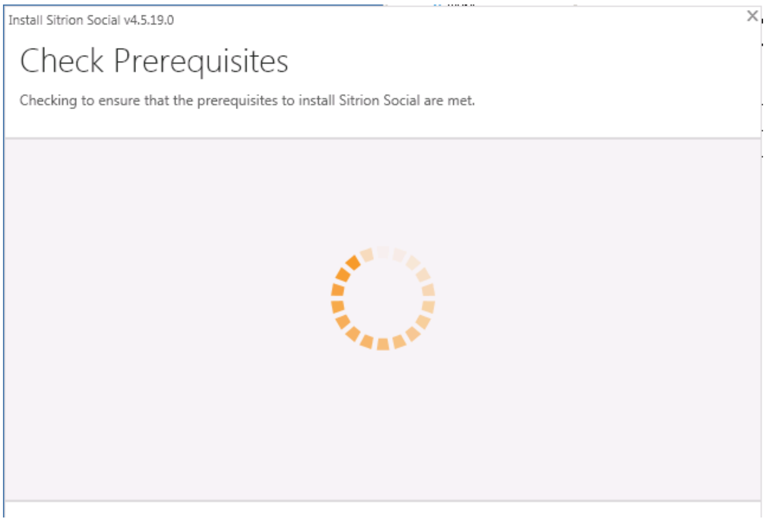
If User Account Control is active on this server, you'll need to launch this by right-clicking on Launcher.exe and choosing "Run As Administrator" from the drop-down menu. This displays the Aurea Social Launcher.




*Screenshot 37: Sitrion social*

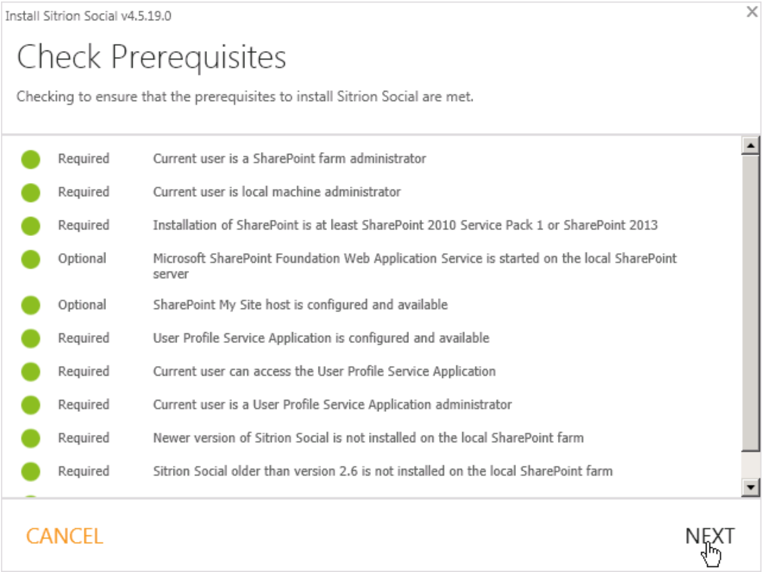
## Checking Prerequisites in Advance of Installation, Repair, or Upgrade

Atop the Install section of the launcher, the Check Prerequisites option allows you to find out if there are any prerequisites that still need to be met, without having to launch the install first, nor agree to the License Agreement first.




*Screenshot 38: Check prerequisites*

Upon clicking Check Prerequisites, you'll see a “working” screen like the one above while various prerequisites are checked. When complete, a summary of the results is displayed, as below.




*Screenshot 39: List of prerequisites*

If you fail any of the “Current User is Farm Administrator”, “Current User has access to User Profile Service Application”, or “Current User is User Profile Service Application Administrator” prerequisites, follow the directions in Setting up your account with the SharePoint permissions that are needed to install Aurea Social to grant the proper rights to your account, or login with a different account that has the rights described in part B of the Account/permissions prerequisites section.

If you fail the “Installation of SharePoint is at least SharePoint 2010 Service Pack 1 or SharePoint 2013” prerequisite, you probably have SharePoint 2010 without Service Pack 1. Install.

If you fail the “User Profile Service Application is Configured and Available”prerequisite, refer to the Technet article “Create, edit, or delete a User Profile service application (SharePoint Server 2010)” for SharePoint 2010 installations, or to “Create, edit, or delete User Profile service applications in SharePoint Server 2013” for SharePoint 2013 installations.

If you’d like to see more detail regarding what was done during the prerequisite check, you can refer to the log file that is automatically generated in the install folder, title like “NewsGatorLog_2013_03_17_18_35_38”, where the trailing string of numbers indicates the year, month, day, and time when the prerequisite check was started.

### Pre-4.5 to 4.5-and-later upgrades only: removals and deactivations for Social Search BDC Model

As of the 4.5 release, the Social Search BDC Model to integrate with SharePoint search has been changed. Consequently, after upgrading from any version prior to 4.5 to 4.5 or later, the search integration needs to be setup again.

To make this easier to do, prior to upgrading to 4.5 or later, it is recommended to remove the existing content source in the Search Service Application for the Aurea Social data and deactivate the NewsGator Social Search BDC Model farm features.

### Upgrades only: optional reboot to unlock files

If you have solutions that are failing to deploy during upgrades, rebooting the server to which solutions are deployed unlocks any solution files that are locked and thus preventing deployment.

### Turn off antivirus software

You should turn off antivirus software on the server on which you are running Setup, and leave it off for the duration of install. Turn it back on when install is complete.

## 1.25 Installation, Upgrade, and Repair

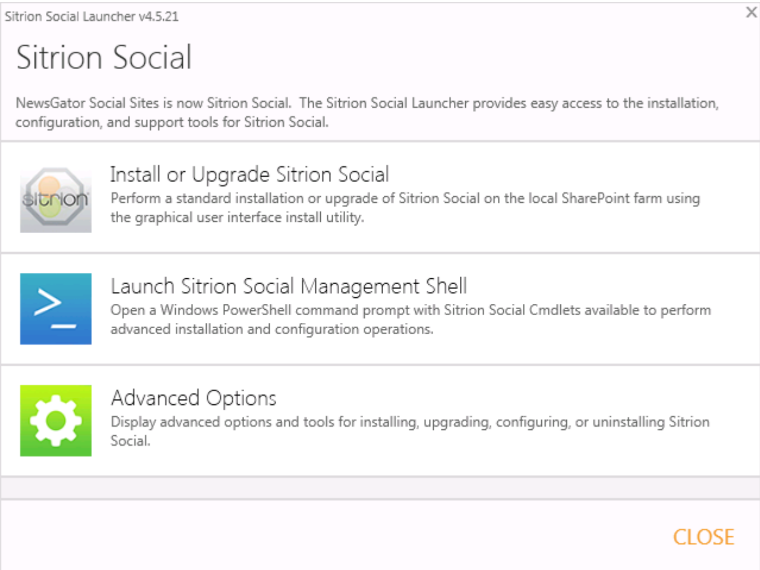
In this section, you can learn about installing, upgrading and repairing Aurea Social.

### 1.25.1 Installing by script

You can perform a scripted install of Aurea Social by following the instructions in Using Powershell to perform a scripted install of Aurea Social on SharePoint 2010 SP1 or SharePoint 2013.

### 1.25.2 Installing by GUI

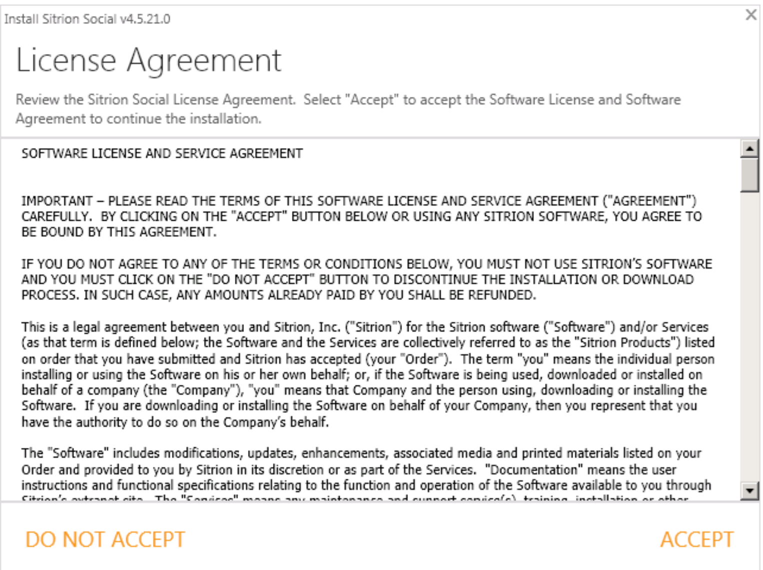
To install Aurea Social for the first time, or to upgrade an existing installation from an earlier version to a newer version, or to repair an existing installation using the setup files for the version you already have, click **Install or Upgrade Aurea Social** in the Aurea Social Launcher.




*Screenshot 40: Aurea Social launcher*

License Agreement

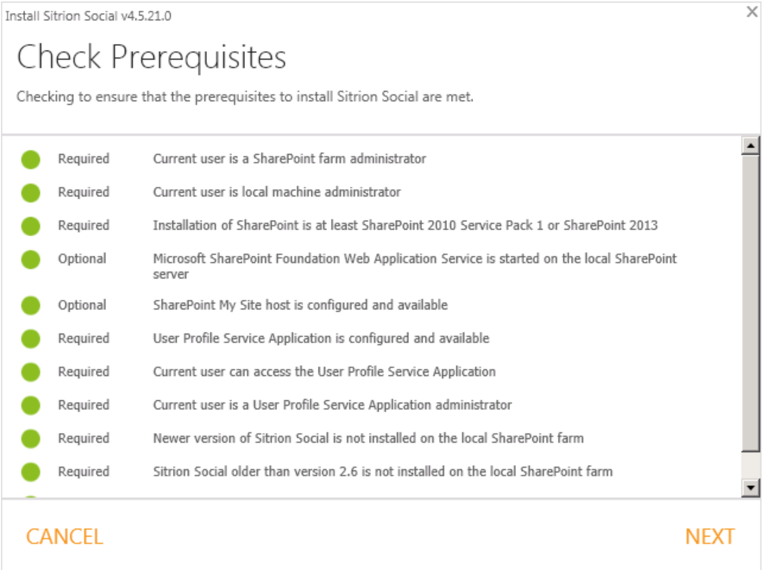
The first screen presents the **Aurea Social license agreement**. After reading the agreement, if you agree to the terms, click **Accept** to declare your agreement to the terms and to proceed with install, upgrade, or repair. Setup does not allow you to proceed to the next screen if you have not agreed to the terms of the license agreement.




*Screenshot 41: License agreement*

#### Prerequisites check screen

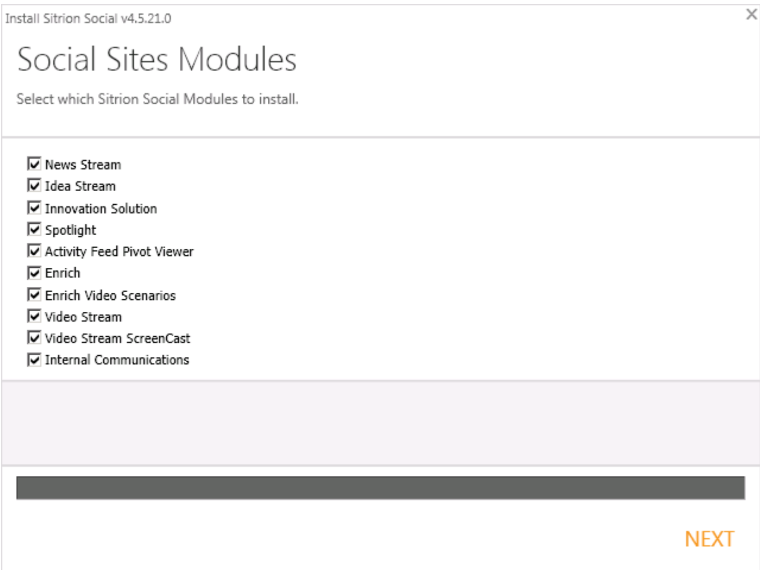
Next comes the **Check Prerequisites** screen. Here the same checks are performed as in checking prerequisites before installation, repair, or upgrade and you can check it for help on addressing any prerequisites that this screen reports as not met.




*Screenshot 42: Check prerequisites screen*

Click **Next** to proceed to the Installed Components screen.

### Modules selection screen



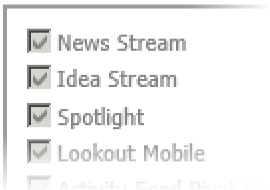

*Screenshot 43: Social sites module*

The **Modules selection screen** lists all optional modules that are represented in your solutions folder. **Activity Stream Pivot Viewer** is part of the core Aurea Social offering and always appear here.

Although part of the core offering, they are not mandatory for Aurea Social to function and may be left out by unchecking them.

Normally you would not uncheck any of these non-core modules here, as all non-core modules come at an extra charge (depending on how and when the product was purchased).

When upgrading or repairing, the already installed modules appears greyed out, and cannot be unchecked. Only the modules that are not installed are editable (can be checked or unchecked).



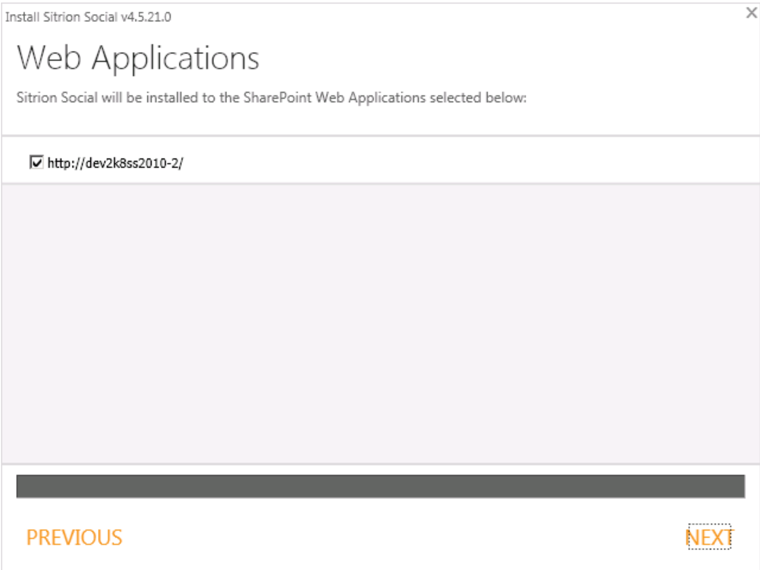

*Screenshot 44: Uncheck modules that are not required*

To help you decide whether you wish to include a certain option, select it and the Details pane on the right provides a description of it.

Any optional modules, that you purchased, are presented at the bottom of the options list. Any optional modules you leave unchecked here is not installed.

Click **Next**.

## Web applications selection



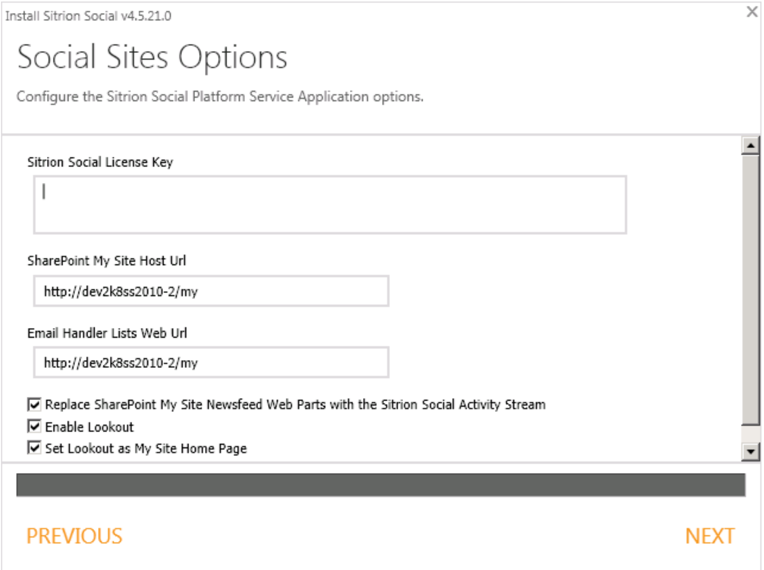

*Screenshot 45: Web applications*

> **Note:**
> The Web Applications screen appears only for new installations of Aurea Social, and not for upgrades or repairs.

It lists all the web applications in your farm except for the Central Administration web application. Specify only those web applications to which you want Aurea Social deployed by checking the corresponding boxes.

Click **Next**.

Aurea Social options selection




*Screenshot 46: Social sites option*

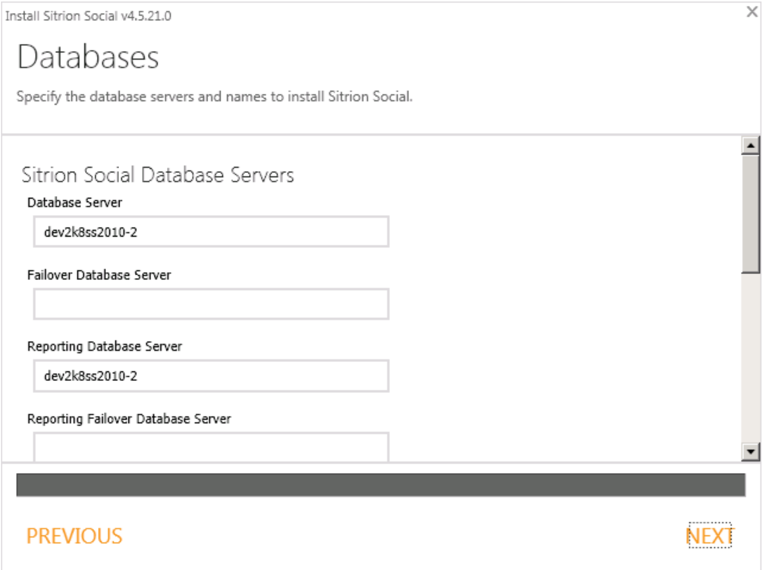
> **Note:**
> This screen only appears for new installations of Aurea Social, and not for upgrades or repairs.

Make the following entries on this screen:

| Field | Description |
|---|---|
| Sitiron Social License Key | Copy and paste the license key provided to you by NewsGator Support. |
| Sharepoint Mysite Host Url | This field is specified for alert email replying to work. This is the feature that allows you to add a comment to a conversation or event you have been involved in by simply replying to the email that alerts you to someone commenting on or liking it. |
| Email handler list web Url | This field uses a SharePoint list which may be located anywhere you desire within SharePoint. Simply add the URL of the site you choose here.<br>If you have a site specified in the My Site Location text box above this, a common practice is to simply use that same site. Visitors' experience when viewing the site is unaffected by adding this list to it. |
| Replace SharePoint My Site Newsfeed Web Parts with NewsGator Activity Stream | This option deploys UI elements that provide the full benefits of Aurea Social. It is recommended to check this as part a of any Aurea Social installation. This option removes the SharePoint **My Newsfeed** web part and replace it with the **NewsGator Activity Stream** web part, and add additional NewsGator web parts. |
| Enable lockout | This option adds the Aurea Social Lookout page to SharePoint, at `http://{MYSITE}/Lookout.aspx`, where `{MYSITE}` is your server URL.<br>Select **Set Lookout as My Site Home Page** if you'd like the **My Site** link in users' top navigation bars to redirect users to the Lookout page. The regular newsfeed page is still available at the **My Newsfeed** link. |

Click **Next**.

## Database names and hosts




*Screenshot 47: Databse servers*

> **Notes:**
> This screen appears for all new installations of Aurea Social, but only appears for upgrades or repairs if new modules are being added that require extra information.

This screen can have many options depending on which modules are part of the installation.

On the **Databases** window, specify the following:

| Fields | Description |
|---|---|
| Database Server | Specify which SQL Servers hosts the main Aurea Social database. |
| Reporting Database Server | Specify the Aurea Social Reporting database. |
| Failover Database Server | If you use failover databases in your SharePoint installation as part of a high-availability strategy, you can specify servers that host the failover databases for these as well. For more information on failover database see Plan for availability (SharePoint Server 2010). |

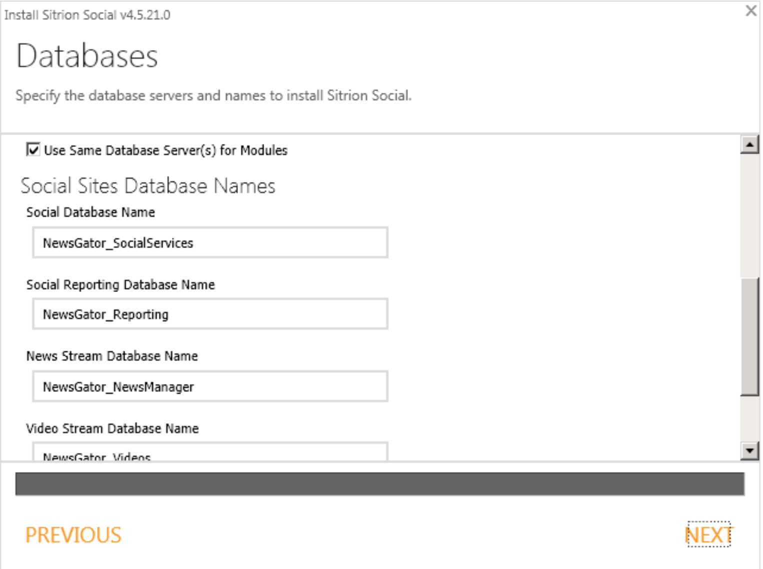
The Aurea Social Reporting database replicates some of the data in the NewsGator Social database each day in an overnight job.

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 does not adversely impact users' social computing experience.

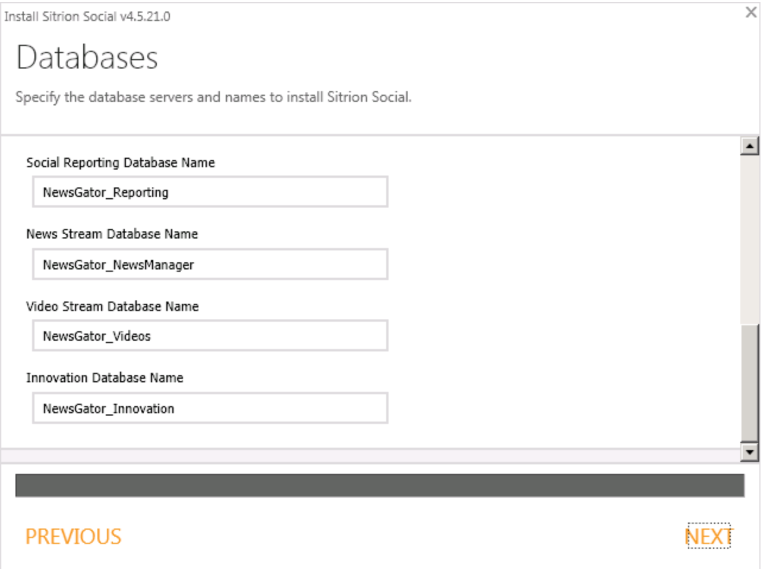
This database is also used by the Spotlight module, for the Top News filter, and for the admin reports web parts.

Click **Next**.

Another **Database** window is displayed.




*Screenshot 48: Set database name*




*Screenshot 49: Set database for the individual module*

Specify the following fields on the Database window:

| Fields | Description |
|---|---|
| Use Same Database Server(s) for Modules | By default this is checked, and causes the News Stream Module, Video Module, and Enrich module to use the same host for their databases as is used for the main Aurea Social database.<br>**Note:**<br>Check this checkbox If you want the modules to use the main database.<br>Uncheck it if you want the modules to use the database of their own. Doing so causes new host entry boxes to appear below it, one host server and one failover server for each module you're installing that has its own database. |
| Section for specifying database host servers (Scroll down to see all fields) | Alter the default name options for each of the databases to be installed. |

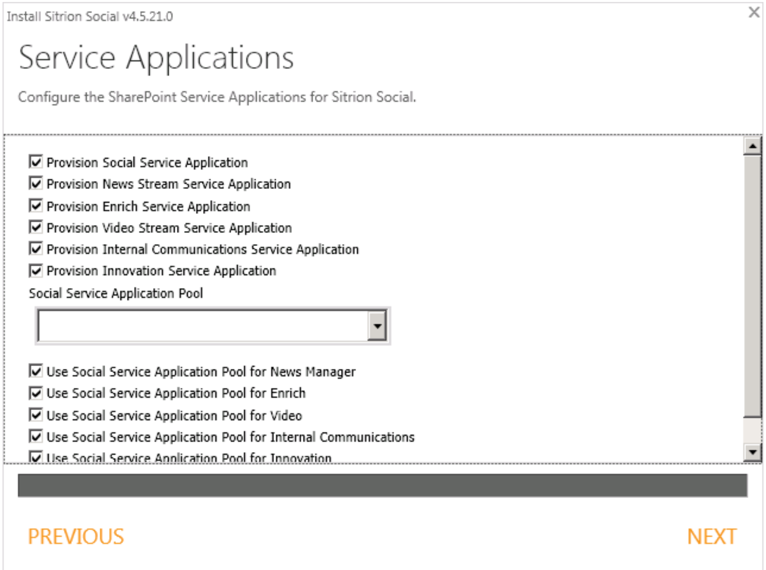
Click **Next**.

## Service Application

**Important:**

In multi-farm environments, the "Provision Social Service Application", "Provision News Stream Service Application", and “Provision Enrich Service Application” options should only be selected when installing to the parent farm, and must be left unchecked in the child farms.

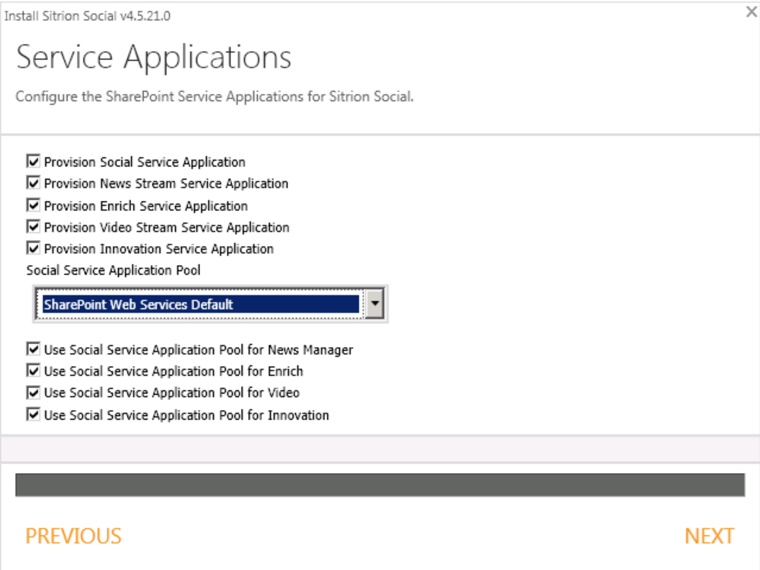
In multi-farm environments, the "Provision Video Stream Service" option should only be selected when installing to farms which has Video Stream enabled communities.




*Screenshot 50: Service Applications*

Check the checkboxes on the Service Applications window as per the below table:

| Checkboxes | Description |
|---|---|
| Provision Social Service Application | This allows Aurea Social to keep the data it needs to function, and to add value by exposing additional data in the SharePoint Activity Stream and in other parts of SharePoint. Without this option, there is little to no value added in installing Aurea Social.<br>In a multi-farm environments, this checkbox should only be selected when installing to the parent farm, and must be left unchecked in the child farms. |
| Provision News Stream Service Application<br>Provision Video Stream Application<br>Provision Enrich Service Application | Check these checkbox to provision the services of the News Stream Module, the Video Stream module, or the Enrich module . (if these are installed)<br>In multi-farm environments, the options to provision these services should only be selected for some of the farms. |
| Provision News Stream Service Application Provision Enrich Service Application | Check these checkboxes only when installing to the parent farm, and must be left unchecked in the child farms. |
| Provision Video Stream service Application | Check this checkbox only when installing to farms which has video enabled communities. |



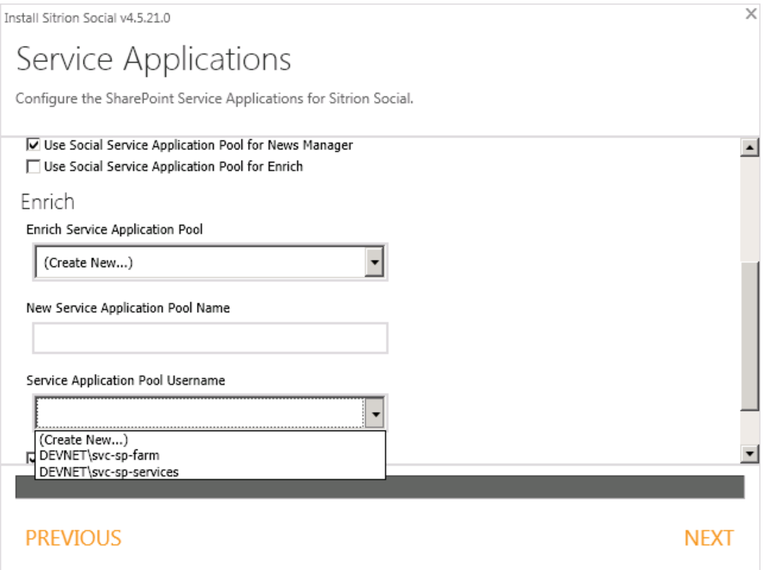

*Screenshot 51: Select social service application pool*

Each service application needs to have an application pool to run in, so for each service application you choose to provision on this screen, you are prompted to specify an application pool.

You may choose an existing application pool for it, or create a new one. **SharePoint Web Services System** is a safe choice.

Do not choose the **Security Token Service Application Pool**.

Click **Next**




*Screenshot 52: Select SharePoint Web Services System*

If you choose to create a new application pool, you need to provide a name for it, and an account that the application pool uses as its security credentials. You are provided the list of available accounts for this purpose.

If you don't see the account you want to use listed, go into SharePoint Central Administration, open the Managed Accounts screen, and register the account you want to use there.

You should then be able to select it in the Service Applications screen of the installer.

The Service Application service account is used by SharePoint to access the databases used by the service application.

In the case of the Social Service Application, the databases are the NewsGator Social Database and the NewsGator Reporting Database.

In the case of the News Stream Service Application, the database is the News Stream database; it goes similarly with the Video Stream and Enrich modules.

> **Important:**
> Regardless of which choices you make here, the account running the NewsGator Social Platform service application needs to be a farm administrator. Otherwise there will be numerous farm properties and persisted objects that it is not able to update.

For each service application connected to a module, you have the option of using the same application pool as is used for the Social Service Application by leaving checked the box labeled "Use Social Service Application Pool for <ModuleName>".

If you'd rather use a different application pool for one of the service applications, uncheck this box, and a control for specifying an application pool for that service application appears.

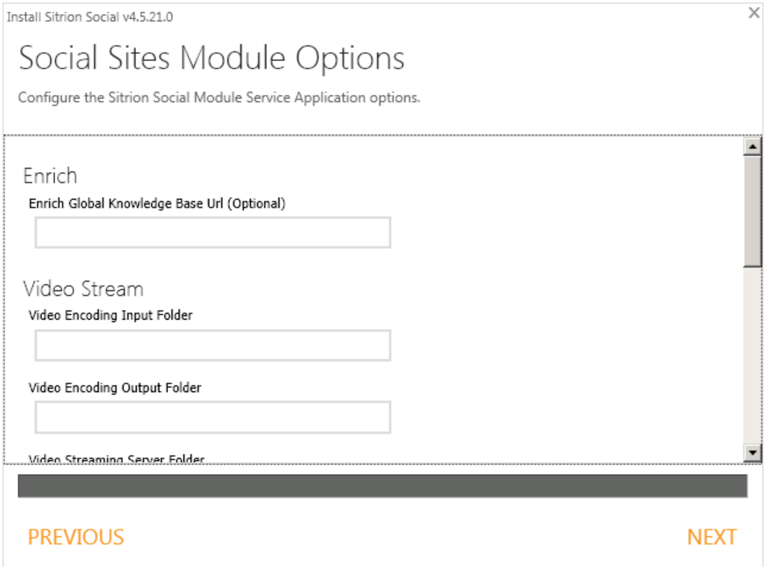
Click **Next**.

### Module Options screen

If you are installing either the Enrich or the Video Stream optional modules for the first time, you'll now be presented with an Options screen.

The installation of the Video Stream module is an involved process that requires several preparation steps.

> **NOTE:**
> If this an upgrade please read the section below "Instructions regarding Video Stream and Enrich Upgrades".




*Screenshot 53: Social Sites Module Options window*

Specify the following fields in the **Social Sites Module Option** window:

| Fields | Description |
| --- | --- |
| Enrich Global Knowledge Base Url | Enter the URL where the global knowledge base for Enrich is to be located. |
| Video Encoding Input Folder | Enter the name of the folder to store videos that are awaiting encoding. |
| Video Encoding Output Folder | Enter the name of the folder to store videos that have completed encoding. |
| Video Streaming Server Folder | Enter the name of the folder to store videos that is streamed. |

| Fields | Description |
|---|---|
| Video Upload Folder | Enter the name of the folder that stores the uploaded files. |
| Video Streaming Server Url Default Zone | Enter the streaming server address. |

**Note:**
Optionally enter details in the other alternate access mapping zones.

Folders can be specified as local folders or as UNC paths.

Take note of these folder names as they need to be specified in the **Encoding Service and Streaming Server install** process in the **Video Stream Additional Components Installation** section.

**NOTE:**
To change any of the above settings after the install, go to **Central Administration > Application Management > Manage Service Applications**. Click on **NewsGator Video Stream Service Application** and select **Properties** in the ribbon area.

To store the video files for the streaming server on another server or a SAN, specify these locations accordingly in the "Video Streaming Server Folder" entry box.

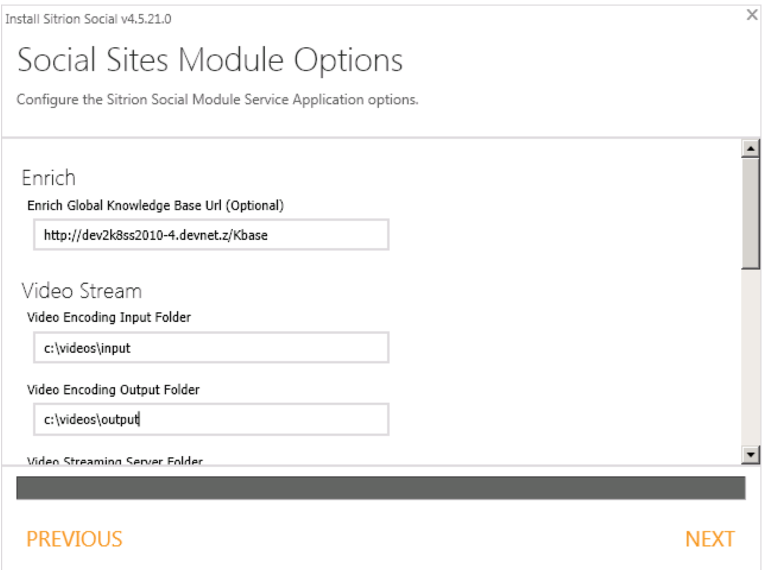
Then, create a virtual folder in IIS mapping it against the physical location of the streaming server folder stored on the server or SAN. This virtual folder then needs to be specified in the Streaming Server Address.

For example, if the Streaming server folder to store videos is `\\OurSan\streamedvideos\` and it's mapped to "videos", then the Streaming Server Address specified above may have "/videos" appended to it.

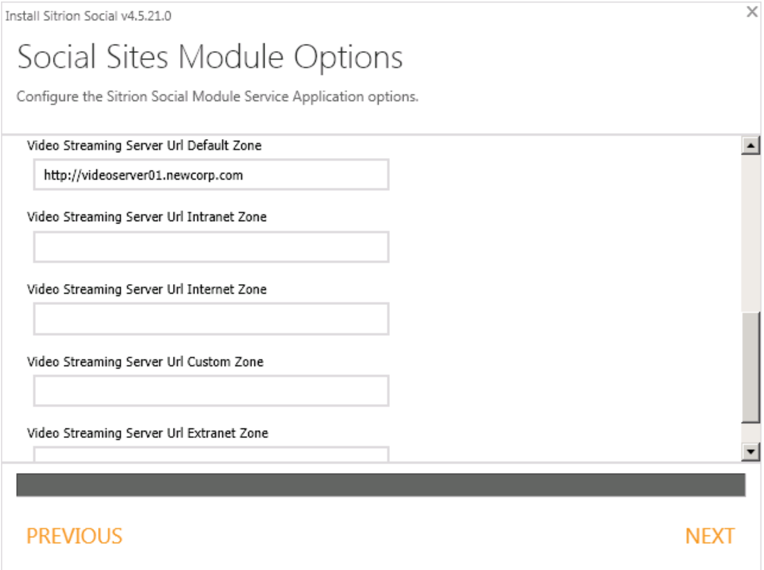
To change the streaming server address to reflect a virtual folder for the streaming videos folder, for example, change the entries in the **Enter addresses…** section of the console accordingly. In the screen shot below, the "Videos" folder in the streaming server specification could well be a virtual folder.

Configuring a virtual server also means updating the **Video Streaming Server Folder** field to reflect the physical location of the files that reside on another machine or SAN. This physical location should correspond to the virtual folder specified in IIS.

Below is an example of the various folders that are specified.




*Screenshot 54: Various folders that are specified*




*Screenshot 55: Various folders that are specified*

Click **Next**.

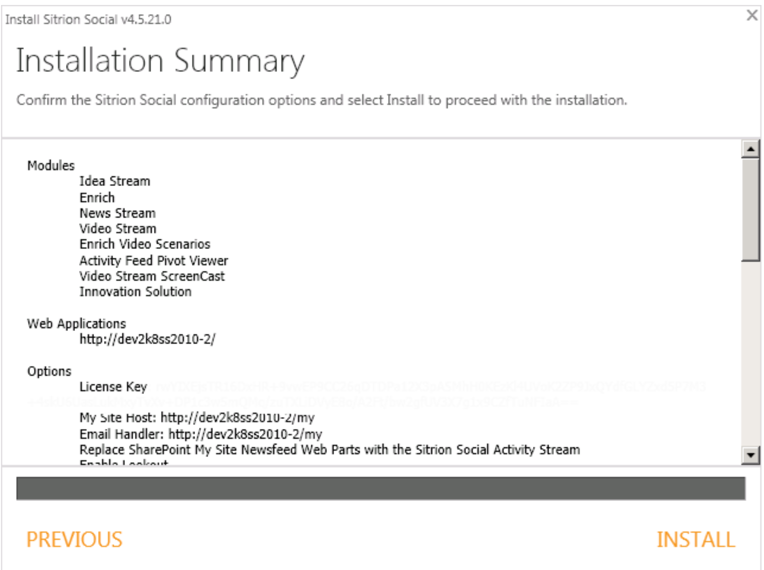
## Installation Summary

After all necessary information are provided, the Installation Summary screen appears so that you can review your choices.

> **Note:**
> Upgrades of Aurea Social shows much less information than the install screen shown here in fresh install process.

> **Note:**
> If you haven't already turned off antivirus software on the server, do so now.

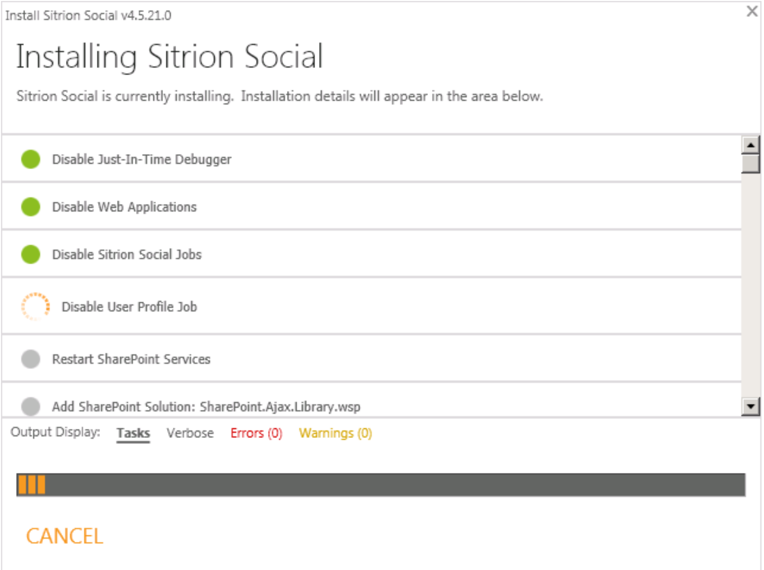
Use **Previous** if you want to change any of the listed options; otherwise, click **Install** to begin the installation process, or **Upgrade** to begin the upgrade process.




*Screenshot 56: Installation Summary screen*

## Installation Status

With installation underway, the Installing Aurea Social screen appears. Each task in the installation, upgrade or repair is listed with an indication of whether it has been started or completed yet. A progress bar indicates progress through the entire installation.




*Screenshot 57: Installation status*

> **Reminder:**
> If you are installing/upgrading the Video Stream Module please remember to run the **Additional Components** installer, once the primary installer finishes.
> For further information, see Video Stream Additional Components Installation.

## 1.25.3 If something goes wrong during install

Do the following, If something goes wrong during install:

1. Open your install log, located in the Setup folder you're running the install from.

2. Correct whatever error is reported there.

3. Repeat the install attempt.

> Contact your NewsGator support representative, if you need further help.

Additionally, if install has managed to create it before your error occurs, the NewsGator Social Platform management page (**SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform**) displays much troubleshooting information, and allows the unprovisioning and reprovisioning of many components that should be provisioned during install.

For further details, see Aurea Social Administration Guide.

#### If some solution DLLs do not get deployed to the GAC

If you have to manually deploy some Aurea Social solutions into the GAC, you have to be sure to restart the SharePoint timer service. Until you do, or until it restarts itself, any associated jobs won't run.

#### If some solutions fail to deploy

If on upgrading you have solutions that are failing to deploy (these will show on the **Solution Management** page of **Central Administration** with a status of “Error”), it could be that some of the files the solution must update have been locked by the system. Rebooting the server to which solutions are deployed will unlock any solution files that are locked and thus preventing deployment. Retry the upgrade after rebooting.

**If community activity streams aren't displaying usernames nor avatars, and 'like' and 'follow-up' don't work**

The `AntiXssLibrary dll` most likely didn't get deployed to the GAC on the server which runs the NewsGator Social Platform Service application. Try going to **Central Administration -> System Settings -> Manage Farm Solutions** and deploying the `SharePoint.ajax.wsp` solution. From the drop down menu choose **CA** app. Then recycle the NewsGator backend app pool.

**Workarounds for Known Issues with Enrich Module**

Knowledge Base pages may crash after Enrich has been upgraded to 4.1

In some upgrade scenarios, the Enrich Service Application is not available after upgrade. This may cause an “Add a Knowledge Base” form or the Knowledge Base tab to crash. To address this, delete and re-create the Enrich Service Application.

### 1.25.4 If you upgraded from Aurea Social v4.0 and have the Internal Communications solution

The v4.0 Internal Communications solution configures a “Person” tile for you. In v4.1 and up this needs to be replaced by the new Internal Communications Tile.

However, the installer cannot perform this replacement. To swap out the tiles currently assigned to users, you need to run an SQL update on the backend SQL Server for Aurea Social.

> Contact NewsGator Services for a copy of the SQL which needs to be run.

## 1.26 Video Stream additional components installation

If installing the Video Stream module, an additional installation process must be performed now that the core installation has been completed. This will install the encoding server and streaming servers. These are distributed by an installer that is separate from the Aurea Social installer. Neither of these two components requires SharePoint to be installed on the same server.

It is advisable to install the Encoding Service on a server separate from the SharePoint farm. The Encoding Service will have high CPU usage which could interrupt service to any other applications hosted on the same server.

The Streaming Server can be installed onto a dedicated streaming server or a SharePoint server.

For Software Prerequisites, refer to “Before You Begin – Software prerequisites” in this manual.

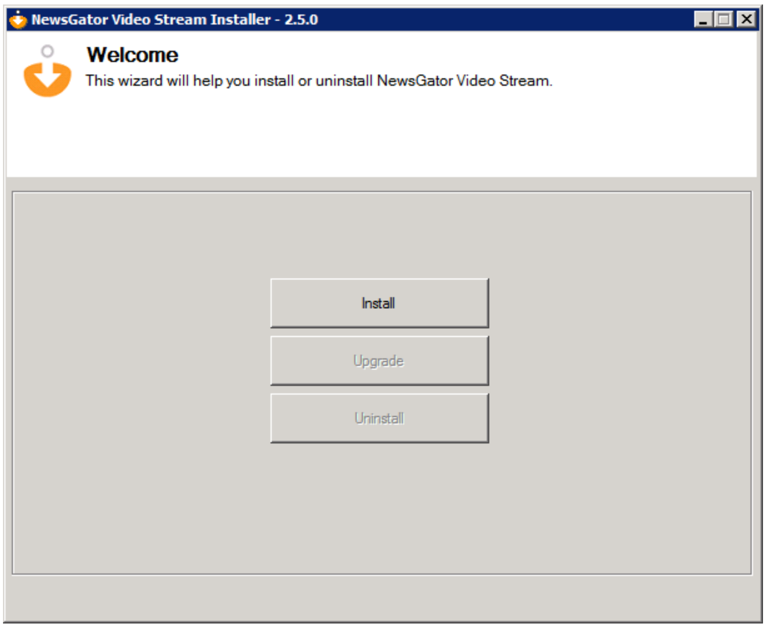
For a summary of all of the relevant SharePoint features supporting Video Stream, see Video Stream SharePoint Features within this document.

If you have Kontiki and want to use it to handle streaming, please see Appendix O - Aurea Social Video Stream 5.0 Integration with Kontiki.

### 1.26.1 Install instructions

The Video Stream Additional Components installer comes with the WSP file as a “setup.exe”. Copy this file to the encoding and streaming servers you are installing to.

When the installer first starts you will see 3 options. If this is a new install click the “Install” button.




*Screenshot 58:* ***Welcome*** *screen*

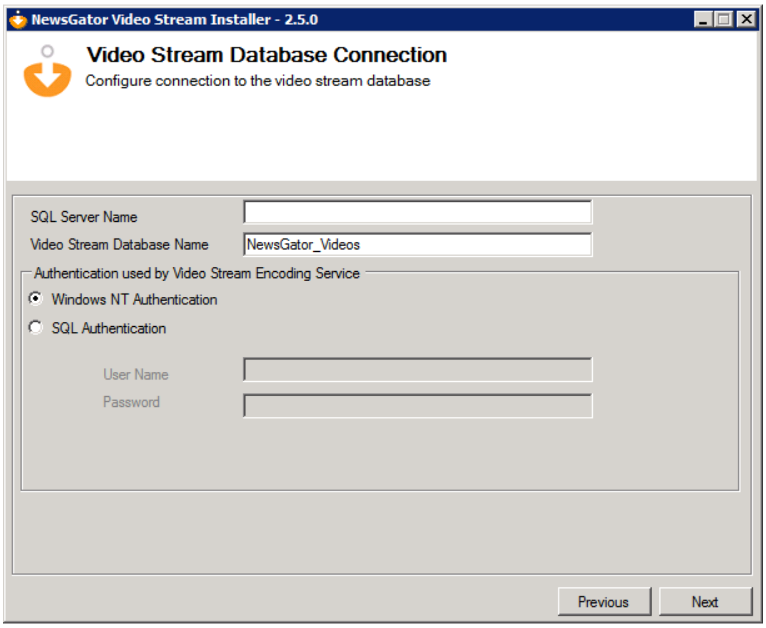
## Database configuration

The SQL Server connection parameters entered here will be used by Video Streaming Server and Encoding Service. SQL Server Name is the name of the server hosting the Video Stream database.

> **Note:**
> This should be the same server entered into the Aurea Social Installer Video Stream options page.

Video Stream Database Name is the name of the server hosting the Video Stream database.

> **Note:**
> This should be the same database name entered into the Aurea Social Installer Video Stream options page.




*Screenshot 59:* ***Video Stream Database Connection*** *screen*

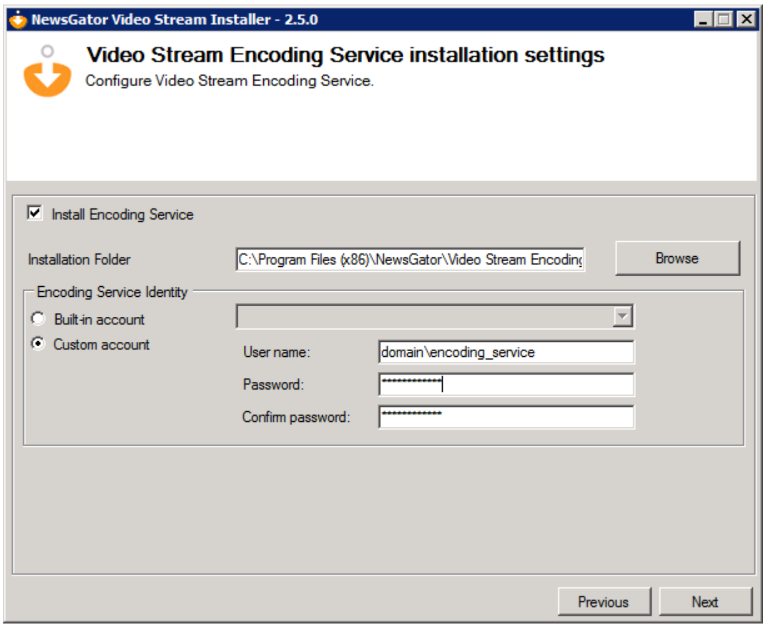
Click **Next**.

### Encoding service

The Encoding Service can be optionally installed by checking the "Install Encoding Service" checkbox. The Installation Folder is used to configure the directory where the Encoding Service will be installed.

The Encoding Service Identity section is used to set the Account under which the Encoding Service will run. This account needs to have read/write access to the input and output encoding directories.

Also, this account needs dbowner role on the Video Stream database.




*Screenshot 60: **Video Steam Encoding Service Installation settings** window*

### Streaming server

The Streaming Server can be optionally installed by checking the **Install Streaming Server**.

The Physical Path option is used to configure where the Streaming Server website will be created.

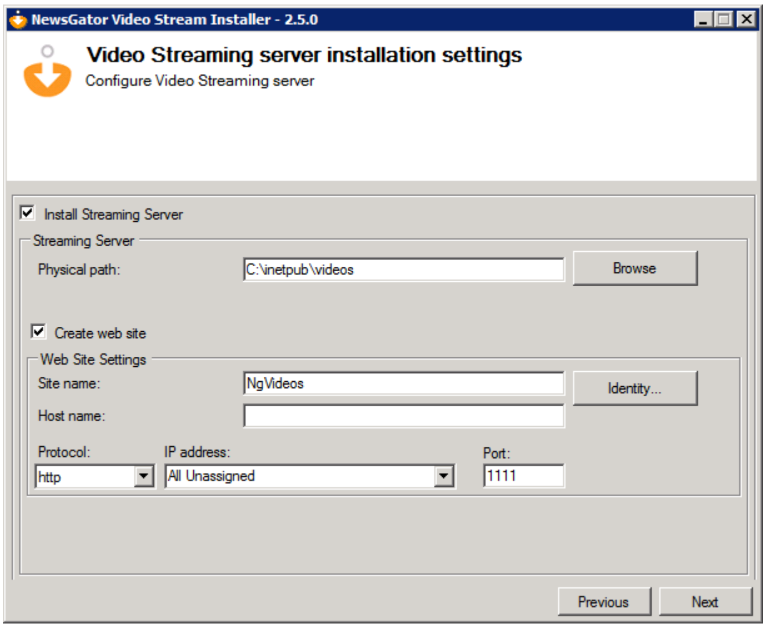
This folder will be the one pointed to be the Streaming Directory (local path or UNC) configured in the Aurea Social installer. See the "Steps before Installing" section.

The installer can optionally create the required website in IIS. Check the "Create web site" check box if the installer should create this web site. Currently, the streaming server needs to be on the same domain as the SharePoint server.

For example, if SharePoint is running on `sperver.com`, then a video sub-domain could be `video.spserver.com`. While any available port can be used for the streaming server, we recommend using port 80 to avoid issues with corporate firewalls.

The options in the Web Site Settings section are the same options available from the IIS Management Console. The options chosen here are exactly analogous to creating a new web site in the IIS Management Console. The settings chosen here must match the Streaming Server address specified in the Aurea Social installer.

The Identity button can be used to set the Identity of the Streaming Service website's application pool. This account will need read access to the Physical Path folder. The default identity is normally sufficient.

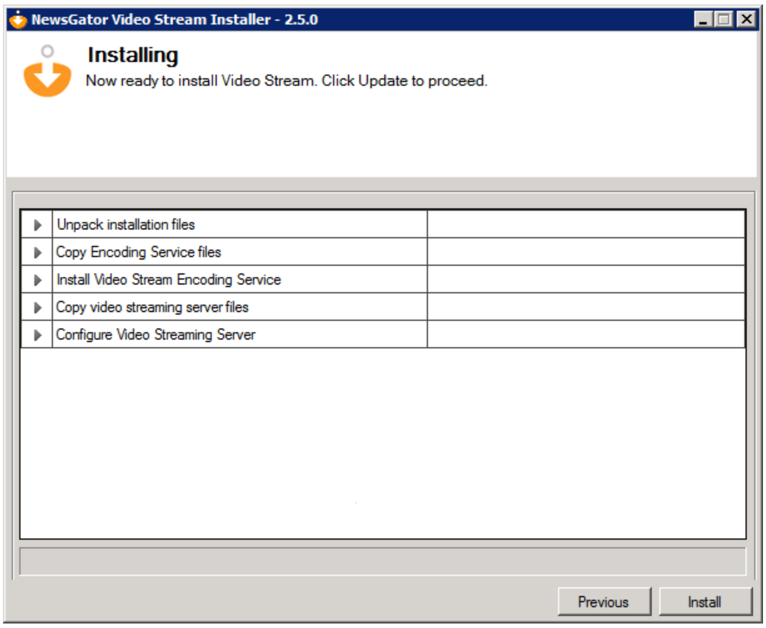



Screenshot 61: ***Video Steaming Server Installation settings*** *window*

## Installing progress

This screen shows the progress of the installer as it progresses through the install. A check mark will be displayed for each task as it finished successfully.

If any errors are encountered, they will be displayed here.




*Screenshot 62: Installing window*

## 1.26.2 If something goes wrong during the Video Stream additional components install

If something goes wrong during install, you will want to:

1. Open your install log, located in the Setup folder you're running the update from.

2. Correct whatever error is reported there.

3. Repeat the update attempt.

Contact your NewsGator support representative should you need further help.

# 1.27 Installation Next Steps

Below are the next steps after installation:

## 1.27.1 Antivirus software

Now that you're done installing or updating Aurea Social, turn on your antivirus software on the server if you have previously turned it off.

## 1.27.2 Stop back-end services on web front ends

By default, every install leaves the Aurea Social backend services running on all servers in the farm, even the web front ends.

1. From Central Administration, go to **Application Management > Manage Services on Server**, and find these two NewsGator services:

- NewsGator Social Application Services
- NewsGator Social Platform Services v2

2. At the top of the page, click on the **Server dropdown** and select **Change Server**.

3. Choose a web front end server, then stop both of these services.

4. Repeat for each web front end.

## 1.27.3 Next steps for multi-farm installations

#### Stop Social Application back-end service on child farms

Because you're not running the Social Platform service application on the child farms, you don't need the NewsGator Social Application Services backend service on any of the servers on a child farm. While you're stopping this service on the web front ends on child farms (see previous step), also stop it on the other servers of the child farms.

#### Connect child farms to the parent's service applications

For Aurea Social to work properly in a multi-farm environment, the child farms must connect to the parent farm's NewsGator Social Platform Service. For installations with the News Stream module, they must additionally connect to the parent farm's NewsGator News Stream Service.

This is a two-step process that consists of:

1. Publishing the services from the parent farm

2. Connecting to the services from each child farm

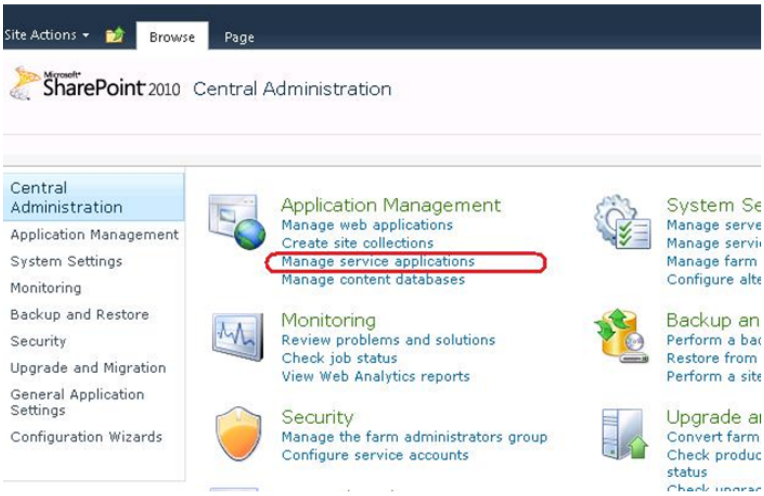
For further details, see Connecting Child Farms to NewsGator Services on the Parent Farm.

#### Grant delegation and impersonation rights to all consumer farm app pool identities

To talk properly back to the parent farm, the app pools in consumer farms must have Delegation and Impersonation rights granted. Gather a list of all app pool identities in the consumer farms, then proceed as follows:

1. Open **SharePoint Central Administration**.

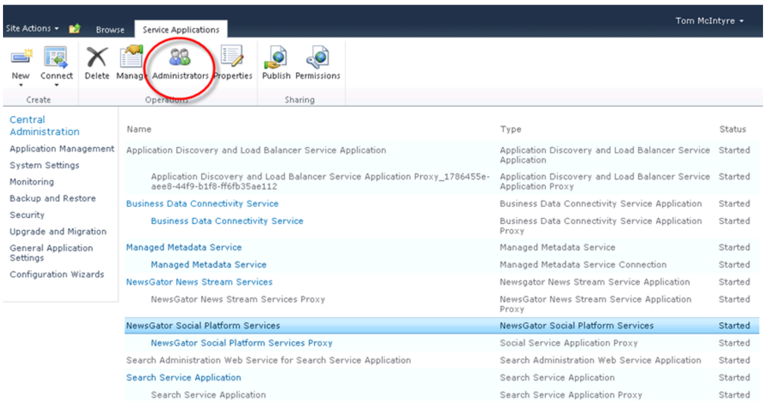
2. Under the **Application Management** area, click the **Manage Service Applications** link.




*Screenshot 63: Click **Manage Service Applications***

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**. A dialog window titled Administrators for NewsGatorSocial Platform Services displays.



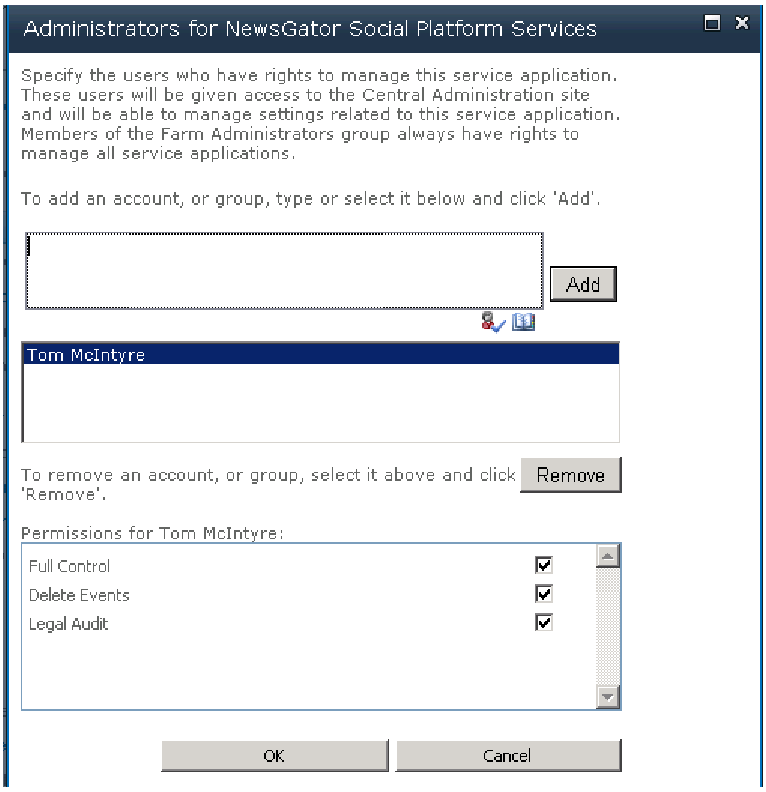

*Screenshot 64: Click Administrators*

5. Type the name of all the app pool accounts 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 account names you typed. When you have it correct, click the **Add** button.

7. Selecting each account in turn in the middle box, check **Delegation and Impersonation** in the **Permissions ...** box at the bottom.

8. Click **OK** to close the dialog.




*Screenshot 65:* ***Administrators for NewsGator Social Platform Services*** *window*

## 1.27.4 Turning on and configuring diagnostic logging

Unless you are upgrading or repairing and had previously turned on diagnostic logging, by default Aurea Social will log errors, but not warnings. NewsGator recommends you change this setting so that warnings are logged as well.

To do so, follow the instructions in Adding Warnings from Aurea Social to the Event Log.

## 1.27.5 Create an SSL Alternate Access Mapping (SharePoint 2013 only)

If you have installed Aurea Social to SharePoint 2013 and had not previously followed the instructions in the section above titled SSL Alternate Access Mapping required for 2013, then you should do so now.

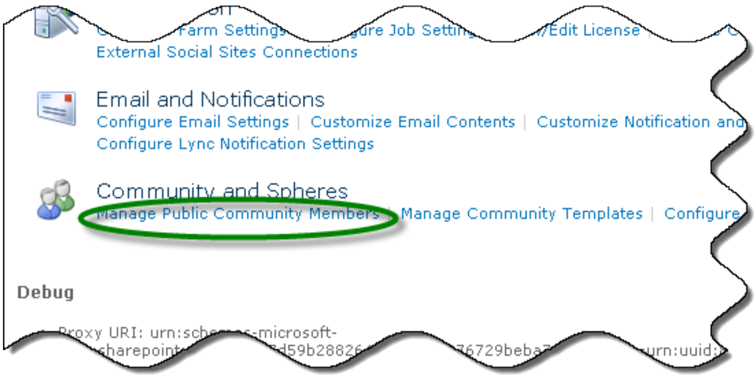
## 1.27.6 Define what "Public" means for Communities

This step only applies to new installs, or to upgrades from versions of Aurea Social before version 2.0. As of version 2.0, Aurea 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 page. The security principals you specify become part of a SharePoint group called Public Community Members.

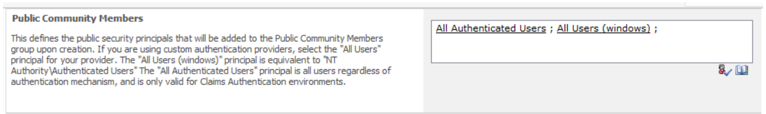
When a public community is created, this group is automatically added with read privileges. The creator can also easily opt to add this SharePoint permission group with contribute privileges, in addition to granting it permission using the normal SharePoint methods.

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.




*Screenshot 66: Click* ***Manage Public Community Members***

This opens an edit box displaying the current security principals that comprise the Public Community Members group:




*Screenshot 67: Edit box displaying the current security principals*

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 are also automatically made in all existing instances of the Public Community Members group in existing site collections and sites.

Removal of principals from this list is not 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.

## 1.27.7 Create an admin site

Unless you just performed an upgrade or repair and had already created an admin site, NewsGator strongly suggests you now create an admin site by creating a new site collection in SharePoint Central Administration using the NewsGator Administration template.

For further details, see Creating a Aurea Social Admin site.

This creates a site collection containing a site from which broadcasts can be sent (a special kind of conversation item that is highlighted and that goes to the top of each user’s activity stream and remains there until cleared by the user), and containing another site that displays globally-scoped reports on user activity.

Each of these two sites has independent permission settings, which in normal use you would set to be exposed only to your chosen management or administrative personnel.

## 1.27.8 Deactivate feature from web applications to which Aurea Social was not deployed

There is a web-application-level feature that you will want to deactivate on web applications to which you have not deployed Aurea Social.

The feature is called the NewsGator SharePoint Actions Integration Feature. If left active on web applications that don't have Aurea Social installed, you may see following errors in your event logs when users without profiles access those web applications:

```
0x35DC NewsGator Social Sites        BackendServices                1001 High
Error connecting to the User Profile Service creating a user profile for ...
```

To deactivate this feature, do the following:

1. On **SharePoint Central Admin** click the **Manage Web Applications** link in the **Application Management** section.

2. Select the web application, then click **Manage Features** in the ribbon. A dialog box will display the web application features.

3. Deactivate the **NewsGator SharePoint Actions Integration** feature.

### 1.27.9 Activate web part features in site collections

You can add new web parts, to the web part galleries of some of your site collections, when you upgrade or repair your Aurea Social.

The core solution of Aurea Social adds three features to every site collection:

» NewsGator Social Web Parts

» NewsGator Community Web Parts

» NewsGator Pivot Viewer Web Parts

Each of these, when enabled, add some web parts to the site collection's web part gallery.

If you've installed or added any optional modules that include their own web parts, each of these will have added a similar site collection feature for adding its web parts to the gallery.

For example, if you added the News Stream Module, there is a site collection feature called **NewsGator News Stream Web Parts**. Usually, these features are deactivated by default. You have to activate the feature on any site collection in which you want to deploy any of the corresponding web parts.

For full details on what these web part features are named and what web parts they deploy to the gallery, see the section titled Web Part Deployment in the Aurea Social Administration Guide.

### 1.27.10 For new installations with Spotlight

For new installations, we recommend you deactivate and then reactivate the **NewsGator Spotlight Installer** feature in the **Farm Features** portion of Central Admin after your installation completes.

This avoids intermittent issues we have seen with Spotlight.

### 1.27.11 When running Spotlight in SSL environments

If you are running in an SSL environment, you must add the SSL certificate from the root CA to the SharePoint certificate store, or else the Spotlight Processing Job fails with an error like the following:

```
Error generating user profile cache for spotlight. System.Net.WebException: The under-
lying connection was closed: Could not establish trust relationship for the SSL/TLS
secure channel. ---> System.Security.Authentication.AuthenticationException: The
remote certificate is invalid according to the validation procedure.
```

You can do this from **Central Administration -> Security -> Manage Trusts -> New**.

### 1.27.12 Upgrading from previous version

Below are the various upgrade related information:

#### If you upgraded from Aurea Social v4.1 or earlier to v4.5 or later and are using BDC Search

As of the 4.5 release, the Social Search BDC Model to integrate with SharePoint search has been changed.

Consequently, after upgrading from any version prior to 4.5 to 4.5 or later, the search integration will need to be setup again.

### If you upgraded from Aurea Social v1.1

When upgrading from 1.1 to higher versions of Aurea Social (then called "Social Sites"), any users that had been granted the **Delete Events** permission in the NewsGator Social Platform Services application will lose that permission.

After completing update, you have to regrant this permission to anyone that should retain it.

For further details on how to do this, see How to Grant Rights to Delete All Events .

### If you upgraded from Aurea Social v1.x, re-enable optional platform features

If you upgraded from any version of Aurea Social (then called "Social Sites") before 2.0, some platform features you have enabled will become disabled.

These include:

- Activity Authors Can Delete Comments
- Append user's full name After @target
- Enable Terms of Use

Go to the NewsGator Social Platform Management page and re-enable these. For further details see the Social Sites v3.5 Admin Guide.

### Run full crawl of the social content source (especially for upgrades from 2.0)

In some cases, incremental crawls of the social content source (the BCS content source of public microblogs, questions, comments and answers that was introduced in 2.0) did not pick up new or changed items.

This issue was corrected in the 2.1 release. We recommend customers run a full crawl of this content source upon install of v2.1 or higher, especially for upgrades from 2.0.

### Upgrading with Customized Email Template

This section applies to two scenarios:

- whether you have a customized email digest template or
- a customized Email Instant Notification template

### Upgrades from Aurea Social v2.0 to 2.1 and higher

If you upgraded from Aurea Social (then called "Social Sites") v2.0 and had a customized Email Digest template, your customized template is kept, so you won't get new lines that were added to the default template that provide the new **View** link feature in posts.

To add these new lines to your customized template, find the lines that generate the "Comment" link. To the end of that line add this:

```
<xsl:iftest='EmailXsltFunctions:ShowViewLink(atom:link[@rel="self"]/@href)'> | <xsl:-
value-ofselect='EmailXsltFunctions:GetViewLink(atom:link[@rel="self"]/@href)'disable-
output-escaping='yes'/></xsl:if>
```

In v2.1 we added two new methods to our helper class:

- **EmailXsltFunctions:** ShowViewLink which looks at a url string and returns true if it's the url of an event we want to display.
- **EmailXsltFunctions:** GetViewLink which takes the view link URL and returns a nicely formatted and localized <a> tag to display.

### Upgrades from Aurea Social v2.1 or lower to 2.5/2.6 or higher

If you upgraded from any version of Aurea Social (then called "Social Sites") prior to v3.0 and had a customized Email Digest template or had a customized **Email Instant Notification** template, your customized template is kept, so you won't be able to take advantage of the changes made to the Digest Email functionality in 2.5/2.6 unless you make changes to your template along the lines of those listed below.

However, there were several additions to the output XML and consequent changes to the XSLT.

We suggest that customers consider downloading the default XSLT and study it to understand the changes we've made. It may be easier to download our updated template and apply customer specific changes to it rather than trying to update the customer's custom template.

The biggest changes between the 2.1 release and the 2.5/2.6 release are:

- Added a function to URI encode URIs (there isn't a default XSLT way to do this and some email clients want it.)
- Displaying polls
- Displaying attachments
- Added Like link to posts
- Added Follow-up link to posts
- Added Mute link and message to bottom of email (Instant Notification emails only)

The function to URI encode URIs can be added to any URI (For example where they show `atom:author/atom:uri`)

```
<xsl:value-of select="EmailXsltFunctions:UriEncode(atom:author/atom:uri)" disable-out-
put-escaping="no"/>
```

The code for displaying polls is as follows:

```
<xsl:template match="ng:pollOption">
    <li style="padding: 3pt 3pt 3pt 3pt; border-bottom: 1px dotted #ddd;">
      <div>
        <xsl:value-of select="ng:name"/>:
        <xsl:choose>
          <xsl:when test="ng:count=1">
            <xsl:value-of select="ng:count"/><xsl:text></xsl:text><xsl:value-of
select='EmailXsltFunctions:GetLocalizedString("Vote")'/>
          </xsl:when>
          <xsl:otherwise>
            <xsl:value-of select="ng:count"/><xsl:text></xsl:text><xsl:value-of
select='EmailXsltFunctions:GetLocalizedString("Votes")'/>
          </xsl:otherwise>
        </xsl:choose>
      </div>
    </li>
  </xsl:template>
```

Here's an example of displaying an attachment:

```
        <!-- ATTACHMENT -->
        <xsl:if test='atom:link'>
          <xsl:choose>
            <xsl:when test="atom:link/@ng:websize">
              <a href="{atom:link/@href}" title="{atom:link/@title}">
                <img src="{atom:link/@ng:websize}" alt="{atom:link/@title}" />
              </a>
            </xsl:when>
            <xsl:when test="atom:link[@rel='enclosure' and starts-with
(@type,'image/') and @length &lt; 150000]">
              <a href="{atom:link/@href}" title="{atom:link/@title}">
                <img src="{atom:link/@href}" alt="{atom:link/@title}" />
              </a>
            </xsl:when>
            <!--<xsl:when test="atom:link[@rel='enclosure']" >
              <a href="{atom:link/@href}" title="{atom:link/@title}">
                <xsl:value-of select="atom:link/@title"/>
                <xsl:text disable-output-escaping="yes">XXX</xsl:text>
              </a>
            </xsl:when>-->
            <xsl:otherwise>
              <a href="{atom:link/@href}" title="{atom:link/@title}">
                <xsl:value-of select="atom:link/@title"/>
              </a>
            </xsl:otherwise>
          </xsl:choose>
        </xsl:if>
```

Here's an example of displaying a Like link:

```
<xsl:if test="ng:allowActions/ng:like">
            <xsl:if test='EmailXsltFunctions:ShowLikeLink(atom:link[@rel-
l="self"]/@href)'>
              | <xsl:value-of select='EmailXsltFunctions:GetLikeLink(ng:eventKey)'
disable-output-escaping='yes'/>
            </xsl:if>
          </xsl:if>
```

Here's an example of displaying the "Mute" link (Instant notification emails only):

```
<span style='font-size:9pt;'>
         <xsl:text disable-output-escaping="yes">&amp;nbsp;</xsl:text>
         <xsl:value-of select='EmailAlert:GetUnsubscribeThisEventLinkAndText
(atom:entry/ng:eventKey)' disable-output-escaping='yes'/>
       </span>
```

## Upgrades from any version of Aurea Social prior to v3.0

If you upgraded from any version of Aurea Social (then called "Social Sites")prior to v3.0 and had a customized Email Digest template, your customized template is kept, so you won't be able to take advantage of many of the changes made to the Digest Email functionality in 3.0 unless you make the changes listed below to your template.

These modifications were required to make the XML output more extensible in the future and to add further functionality.

Steps 1 through 5 are required. Email digest functionality stops working if these are not implemented:

1. Add a new namespace to the template `xmlns:digest="uri://newsgator.com/social/digest"`.

2. Replace references to the element named `atom:groupName` with `digest:name`

3. Replace references to the element named `atom:colleagueName` with `digest:name`

4. Replace references to the element named `atom:colleagueRecordId` with `digest:id`

5. Replace references to the element named `atom:groupId` with `digest:id`

6. Add a section to call the template for the new chronological ordering option. By default it is in the root (/digest) template and looks like this:

7. Add a template for the new chronological ordering option. By default it looks like this:

```
  <xsl:template match="ChronologicalFeed/atom:feed">
    <xsl:if test="count(atom:entry) > 0">
      <div>
        <table cellpadding="5" cellspacing="0" width="100%">
          <xsl:apply-templates select="atom:entry">
            <xsl:sort select="atom:updated" order="ascending"/>
          </xsl:apply-templates>
        </table>
      </div>
    </xsl:if>
  </xsl:template>
```

8. Add code to the root (/digest) template to call the template for the new **My Activities** content source. By default it looks like this:

```
<xsl:if test="count(ConversationFeed/atom:feed)">
          <div>
            <h1>
              <xsl:value-of select='EmailXsltFunctions:GetLocalizedString("DigestE-
mailMyActivityHeading")'/>
            </h1>
          </div>
          <!--All activity in chronological order-->
          <xsl:apply-templates select="ConversationFeed/atom:feed">
          </xsl:apply-templates>
        </xsl:if>
```

9. Add a template to display the new **My Activities** content. By default it looks like this:

```
  <xsl:template match="ConversationFeed/atom:feed">
    <xsl:if test="count(atom:entry) > 0">
      <div>
        <table cellpadding="5" cellspacing="0" width="100%">
          <xsl:apply-templates select="atom:entry">
            <xsl:sort select="atom:updated" order="ascending"/>
          </xsl:apply-templates>
        </table>
      </div>
    </xsl:if>
 </xsl:template>
```

10. There is a new helper function to display the logo of a community if it has one. It can be used like this:

```
<xsl:value-of select="EmailXsltFunctions:GetSocialGroupLogoPictureCid(digest:id,
digest:imageUrl)"/>
```

11. The elements `atom:entry` and `ng:comment` can now have a child called `ng:LinkPreviewInfo`. The default template to render it looks like this:

```
<xsl:template match='ng:LinkPreviewInfo'>
  <table>
    <tr>
      <td width="5"></td>
      <td colspan="1">
        <xsl:if test="ng:ThumbnailUrl">
          <a href="{ng:Url}" title="{ng:Title}">
            <img src="{ng:ThumbnailUrl}" alt="{ng:Title}">
              <xsl:choose>
                <xsl:when test="ng:ThumbnailLandscape='false'">
                  <xsl:attribute name="height">125</xsl:attribute>
                </xsl:when>
                <xsl:when test="ng:ThumbnailLandscape='true'">
                  <xsl:attribute name="width">125</xsl:attribute>
                </xsl:when>
              </xsl:choose>
            </img>
          </a>
        </xsl:if>
      </td>
      <td colspan="2">
        <a href="{ng:Url}" title="{ng:Title}">
          <xsl:value-of select="ng:Title"/>
        </a>
        <br></br>
        <xsl:value-of select="ng:Summary"/>
      </td>
    </tr>
  </table>
</xsl:template>
```

### Upgrades from Aurea Social v3.0 or v3.1

There should be no changes required to your customized template to maintain full email digest functionality when upgrading from Aurea Social (then called "Social Sites") v3.0 or v3.1.

## 1.27.13 Instructions regarding Video Stream and Enrich Upgrades

#### Video Stream Upgrade Instructions

> **Note:**
> IF Enrich is installed, you must upgrade enrich at the same time. failing to do SO MAY CAUSE ERRORS.

1. Place the VideoStream specific WSP files into the Social Sites installer's "Solutions" folder as per normal.

2. Follow the upgrade steps for Aurea Social as described in Upgrading from previous version.

3. Copy the Additional components installer folder to machines that are running the **VideoStream Encoding Service** and/or the Streaming Service components.

4. On each server run the `Setup.exe` executable in the folder you copied in step 3. Click upgrade and follow the usual steps to upgrade the additional components as described below in the Video Stream Additional Components Installation.

5. Once the steps are completed you should be upgraded.

6. You can verify the installed version by going to `http://yourvideostream/test.aspx` which should indicate the version as <version you installed> (for example 3.0)

7. If you are upgrading from a version prior to 2.0.3, follow the "Installation instructions for Video Stream2.0.3" steps starting at step4 in the Video Stream 2.0 Release Notes.

**Enrich Upgrade Instructions**

> **Note:**
> If video steam is installed, you must upgrade video stream at the same time. Failing to do so may cause errors.

1. Place the Enrich specific WSP files into the Social Sites installer's "Solutions" folder as per normal for modules.

2. Follow the upgrade steps for Aurea Social as described above but note that:

- a. Video Scenarios is automatically installed if Enrich and VideoStream are both installed on the farm.
- b. If installing the Video Scenario component of Enrich the install instructions for Video Stream must also be followed.

## 1.28 Uninstall process

### Overview

This guide is intended to provide steps needed to uninstall Aurea Social.

### Environment Verification

In order to successfully uninstall Aurea Social, it is necessary to first validate the SharePoint environment.

**Check Upgrade Status**

Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Check Upgrade Status**.

Confirm the last event for each server has succeeded. If there is a failure, consult the log file mentioned in the upgrade session details and address the problem. Once addressing the problem, you may need to run `psconfig`.

**Check Product and Patch Installation Status**

Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Check product and patch installation status**.

Confirm that the install status is installed for each product/patch. Address any failures.

**Check Database Status**

Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Review Database Status**.

Confirm that the status for each database is **no action required**. If the status reflects as other than '**no action required**', consult Microsoft Support or Microsoft Technet to take the appropriate action to address the issue.

### Pre-Uninstall Steps

These steps outline the actions necessary to be taken directly before Uninstalling Aurea Social.

1. **Copy Uninstall Scripts to Server and Update Scripts**

i. Copy the uninstall script package to a SharePoint server in the farm (typically this is the Server hosting SharePoint Central Administration).

ii. Ensure that the **.zip** file is not blocked. To do this, right click the **.zip** file, choose **Properties**, and then look for an '**Unblock** button. If you do not find the **Unblock** button, the files aren't blocked. If the button exists, click it to unblock the file. Then unzip the files.

iii. Once the files are unzipped copy all `.wsp` solution files from your original Aurea Social Install into the 'Solutions Artifacts' folder that was contained in the uninstall `.zip` folder.

iv. Next, edit the `uninstallng.ps1` script in an editor of your choice, such as Notepad.

v. Change the URL defined for $WebApp1 and $WebApp2 on line 5 and 6 to the web application URL's where NewsGator is deployed.

vi. Change the URL defined for $MySitesURL on line 7 to the location of your My Site Host.

vii. This URL is defined in **Central Administration -> Application Management -> Manage Service Applications -> User Profile Service Application -> Setup My Sites -> My Sites Host Location**.

viii. Save and close `uninstallng.ps1`.

ix. Edit `CleanActivityTypes.SQL`, and change all instances of 'Profile DB' to the name of your SharePoint Profile DB. Save and close `CleanActivityTypes.SQL`.

2. **Reboot Farm**

Restart each server in the SharePoint farm, including the SQL server. A restart minimizes the chance of any .dlls being locked and that server resources are re-allocated.

3. **Backup Farm**

The farm should be fully backed up before starting the uninstall. The recommended procedure is to take full SQL backups of all SharePoint, including Sitrion/NewsGator, databases. Alternatively, if the farm consists of virtual machines, snapshots are a simple but effective backup mechanism.

4. **Ensure Timer Service Functionality**

Aurea Social relies on the SharePoint Timer Service to successfully retract solutions. If the timer service is non-functional on any SharePoint server on the farm, the upgrade could fail.

To verify timer service functionality, do the following:

i. Navigate to **Central Administration -> Monitoring -> Review Job Definitions -> Job History**.

ii. In the upper right-hand corner, you can filter the View.

iii. From the drop down menu, choose Server.

iv. For each server in the farm, verify that timer jobs have been executing successfully on each SharePoint server in the farm. Each server typically executes several of these every minute.

5. **Turn off Antivirus Software**

You should turn off antivirus software on the server on which you are running Setup, and leave if off for the duration of the upgrade. You can turn it back on once the upgrade is complete.

6. **Note on Uninstall Account**

If the account that you are logged into the server and performing the uninstall with has a large profile, that large profile increases the time needed to perform the uninstall. Aurea Social recommends deleting any unneeded files from the profile.

A profile can get quite large if files, such as service packs, are saved to the desktop instead of a designated downloads folder on the file system or network share.

To check the profile size, do the following:

i. Log on to the server on which you want to perform the upgrade.

ii. Right click on **Computer** or **My Computer**, then **Advanced system settings**.

iii. In the **User Profiles** section click **settings**. All profiles, along with size, are listed.

iv. Locate the profile you are logged in with to perform the upgrade. Get the profile down to 5-10 MB, if possible.

Typically you can find the profile on the file system at `C:\users\%USERNAME%` - move or delete unnecessary or large files.

## Aurea Social Uninstall

These steps outline the actions necessary to be taken directly before upgrading Aurea Social.

### Launch the Uninstall

Remote desktop to the Central Administration server that you copied the Aurea Social uninstall files to as part of the pre upgrade steps above.

Login with the account that will be performing the uninstall (typically the farm account). Right click and 'run as administrator' the SharePoint Management Shell.

Change directory to where you copied the `uninstallng.ps1` script, then Type `\uninstallng.ps1` followed by enter to execute the script.

### Address Warnings and Errors

Once the uninstall is complete, examine the console window. Address any warnings or errors. Some warnings / errors can be successfully ignored after verification of the Post-upgrade steps below.

For example, you may see warning / errors about not being able to restart services. Often this is caused by the services taking longer than normal to restart, but nothing is really wrong or broken. You may need guidance from Aurea Social Support to address these errors.

## Post Uninstall Steps

These steps outline the actions necessary to be taken directly after performing an upgrade of Aurea Social.

### Re Enable Antivirus Software

Restart any antivirus software disabled before performing the upgrade of Aurea Social.

### Reboot Farm

Restart each server in the SharePoint server in the farm.

### Verify Uninstall

Verify the following:

- Check that all NewsGator solutions are removed, including SharePoint.ajax. This is done in **Central Administration -> System Settings -> Manage Farm Solutions**.
- Verify that all NewsGator Farm level features are uninstalled: **Central Administration -> System Settings -> Manage Farm Feature**. All NewsGator features starts with "NewsGator."
- Verify that all NewsGator web application level features are uninstalled: Navigate to **Central Administration -> Application Management**. For each web application select it and choose Manage Features in the ribbon. All NewsGator features starts with "NewsGator."
- Verify that all NewsGator Site Collection Features are removed. Navigate to at least one site collection where you had previously used the NewsGator functionality. Navigate to **Choose Site Actions -> Site Settings -> Manage Site Collection Features**. All NewsGator features starts with "NewsGator" and should not be present.
- Verify that all NewsGator Site Features are removed. Navigate to at least one site where you had previously used the NewsGator functionality. Navigate to **Choose Site Actions -> Site Settings -> Manage Site Features**. All NewsGator features starts with "NewsGator" and should not be present.
- Check that all NewsGator timer jobs are removed in **Central Administration -> Monitoring -> Review Job Definitions**. All NewsGator jobs starts with "NewsGator" and should no longer be present.

- Check that no NewsGator Services are present or running in the farm. You may check this in **Central Administration -> System Settings -> Manage Services on Server**. For each server, check that no services that start with "NewsGator" are present/running.
- Verify that you see no errors on pages that used to contain NewsGator web parts. Typically these would be former community sites or the My Newsfeed page on the My Sites.
- Verify that former communities are still accessible and that you can access the files contained in their document libraries.
- Check that out of the box SharePoint social features are usable. For the Newsfeed, go to your my site host, edit the page, and add the 'What's New' web part. For Tags and Notes, navigate to a document library which contains items, select an item, and click the Tags & Notes link in the ribbon. Verify that you can post oth a tag and note.
- Verify that custom branding is functional without errors related to social sites components.
- SharePoint Health check don't complain about missing NewsGator components.
- Windows server logs are free of NewsGator errors for at least 48 hours post uninstall.

## 1.28.1 Uninstalling Aurea Social

#### When to uninstall

Uninstall Aurea Social only when you are completely done using the product.

You should not uninstall Aurea Social unless you are done using the product. If your intention is to upgrade, use the upgrade path instead. For further details, see the Updating (Upgrading) Aurea Social.

This is because, even though you may have kept your content databases when uninstalling, after reinstall you have to manually activate the **Community Web** feature in every existing community if you want community list events to appear in the community event stream.

You also have to re-activate the Integration feature on any lists that are not part of a community for which you want events appearing in the activity stream.

When upgrading Aurea Social (versus choosing an uninstall/reinstall sequence), the event receivers that these features attach are kept, so no feature re-activations are necessary.

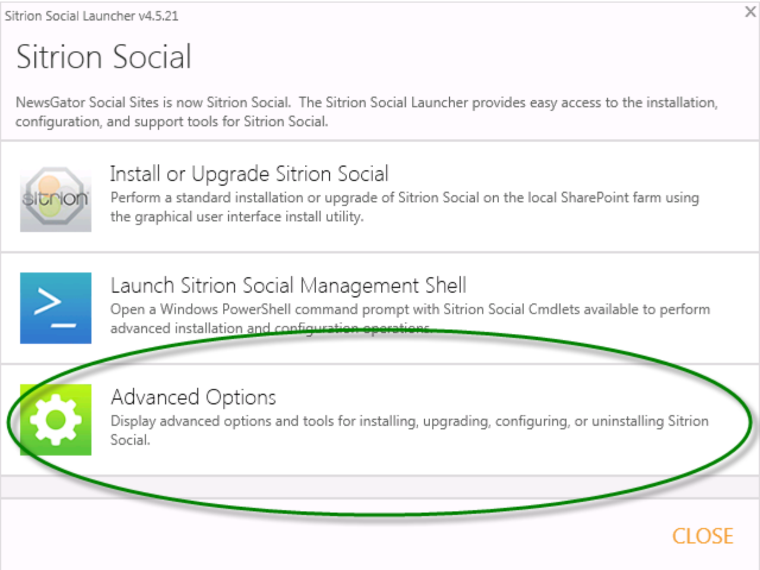
Below are the information related to uninstalling Aurea Social:

### Open the launcher

1. Log in to your Applications server (usually the same as your Central Administration server, but not necessarily the same).

2. Launch `Launcher.exe` from the Aurea Social Setup folder provided to you by NewsGator Support. Aurea Social Launcher is displayed.

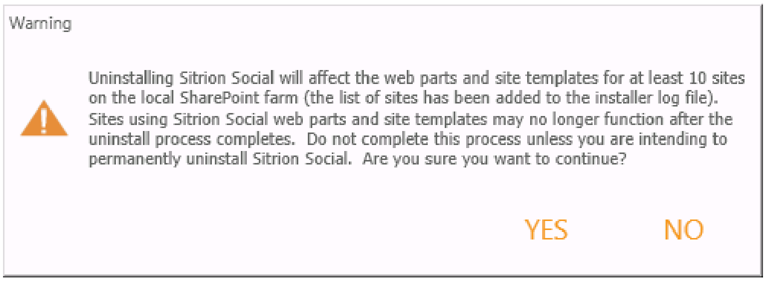
> **Note:**
> If User Account Control is active on this server, you'll need to launch this by right-clicking on `Launcher.exe` and choosing **Run As Administrator**.




*Screenshot 68: Advanced Options*

3. Click **Advanced Options**, and then after a warning message is cleared, click **Uninstall Aurea Social**. You get another warning message telling you how many sites may be negatively affected by the uninstall.

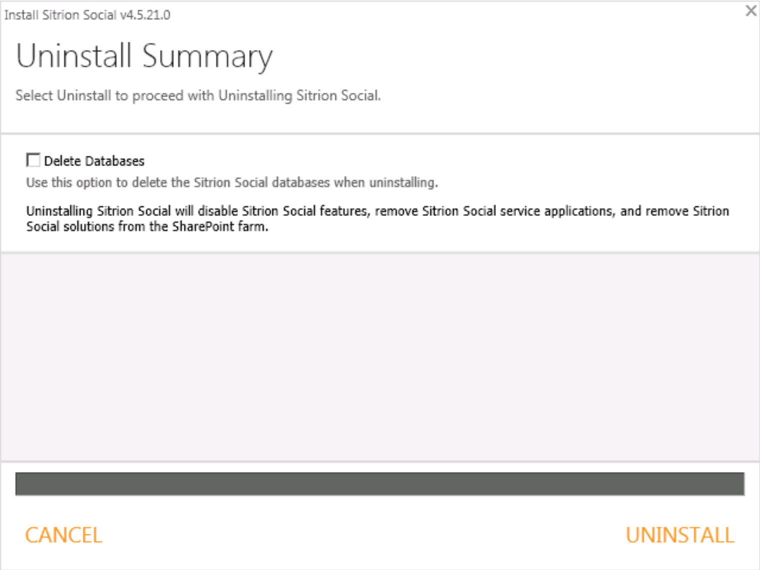
4. Click **Yes**. (If you still want to proceed with uninstall)




*Screenshot 69: Warning dialog box*

5. The **Uninstall Summary** screen appears. On this screen, checking the **Delete Databases** option causes the NewsGator social database and the NewsGator reporting database to be deleted during the uninstall process.

> **Note:**
> If you don't intend to use Social Sites again on the farm, and won't have any use for the activity data added by Social Sites to SharePoint's native activity data, you may safely delete these databases.
> Otherwise you should leave this option unchecked. The databases may be later deleted directly from SQL Server.

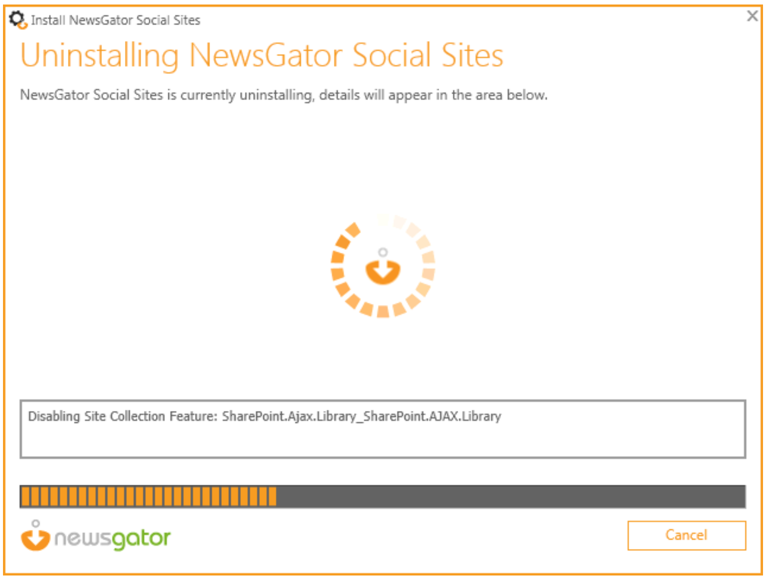



*Screenshot 70: Uninstall Summary screen*

6. Click the **Uninstall** button.

> **Note:**
> If you have not already turned off antivirus software on the server, you should do so now, before clicking Uninstall.

## Uninstalling screen




*Screenshot 71: **Uninstalling Aurea Social** screen*

The Uninstalling Aurea Social screen appears when the uninstall process is in progress. The details area elaborates on the current step of installation, upgrade or repair. A progress bar indicates progress through the entire uninstallation.

Additional uninstall steps for Video Stream module

If you installed the Video Stream module, there are required steps remaining to finish the uninstall process. Un-installation of Video Stream's additional components can be completed by selecting the Uninstall option when running the Additional Components Installer.

If something goes wrong during uninstall, do the following:

1. Open your install log, located in the Setup folder you're running the uninstall from.

2. Correct whatever error is reported there.

3. Repeat the uninstall attempt.

Additionally, if uninstall has not managed to remove it before your error occurs, navigate to **SharePoint Central Administration > Manage Service Applications > NewsGator Social Platform** for troubleshooting information. This page allows the unprovisioning and reprovisioning of many components that should be removed during uninstall.

For further details, see Aurea Social Administration Guide.

Occassionally, after following the above steps, there can still be a component of Aurea Social that uninstall cannot remove. In such cases, the following steps will enable you to manually uninstall Aurea Social:

1. Stop all the NewsGator Timer Jobs.

2. Remove the NewsGator Service Applications (you can choose to keep the data if you wish).

3. Deactivate the NewsGator Farm features.

4. Retract the NewsGator Solutions.

5. Remove the NewsGator Solutions.

6. Check the GAC to make sure all the NewsGator files are gone.

7. Reset the SharePoint Timer Job Service (windows services menu).

8. Reset IIS.

Contact your NewsGator support representative if you need further help.

### Uninstalling a Aurea Social Module

Though it is not recommend to uninstall individual solutions from a SharePoint farm, there may be circumstances in which you need to uninstall a Aurea Social module.

> **Note:**
> SharePoint is not very good at cleaning up files and content after solutions have been removed from a SharePoint farm. If any issues arise after removing a solution from SharePoint, manual intervention may be required.

To remove a Aurea Social module, do the following:

1. Launch the Aurea Social Management Shell from the Aurea Social install utility.

2. Use the `Remove-SocialSitesModules` PowerShell Cmdlet to perform the operation.

For a full list of available parameters for the Cmdlet, use the `Get-Help Remove-SocialSitesModules` Cmdlet, or see Managing Your Aurea Social Installation with PowerShell.

## 1.29 Making changes to your installation

### Adding modules after Aurea Social is installed

If you install Aurea Social, then later purchase additional modules to provide added functionality, you may face one of three possible deployment scenarios for the new modules:

» **You are given a new Setup folder of a version matching the build of Aurea Social you currently have installed.**

In this case you should follow the instructions for Repair, above. When you get to the Modules Selection screen, be sure to check the new module(s).

» You are given a new Setup folder of a newer version than the build of Aurea Social you currently have installed.

In this case you should follow the instructions for Upgrade, above. When you get to the Modules Selection screen, be sure to check the new module(s).

» You are given some `.wsp` files only.

In this case you need the Setup folder you used when last installing or updating Aurea Social. Within that folder is another folder called "Solutions".

Copy the `.wsp` files into this **Solutions** folder, then follow the instructions for **Repair**, above. When you get to the **Modules Selection** screen, be sure to check the new module(s).

## 1.29.1 Creating web applications after Aurea Social is installed

If you create a new web application in your farm after having installed Aurea Social, you have to take some manual administrative steps to ensure Aurea Social is fully deployed to the new web application.

To do this, follow the below steps:

1. Open **SharePoint Central Administration**.

2. Go to the **System Settings** section.

3. In the **Farm Management** section, click **Manage Farm Solutions**.

4. Identify any NewsGator solutions that do not show as "Globally Deployed". Include `share-point.ajax.library.wsp` with these.

Open each of these in turn, and do the following:

1. Click **Deploy Solution**

2. Set the dropdown in the Deploy **To?** section to the new web application.

3. Click **OK**

## 1.29.2 Changing settings made during install

If you decide to change any of the settings you configured during install, run setup again using the same Setup folder you used before, then proceed as described in the topic If something goes wrong during install.

In going through this "repair" process, you can change some of the settings you made.

Some of these settings you can also change without having to run setup again.

The following table lists these settings; you can get more details on these in the Aurea Social v5.0 Administration Guide.

| Setting | Where to change it |
|---|---|
| License Key | SharePoint **Central Administration > Manage Service Applications > NewsGator Social Platform**. In the **Configuration** section, click View/Edit License. |
| Email List Website Location | SharePoint **Central Administration > Manage Service Applications > NewsGator Social Platform**. In the **Email and Notifications** section, click **Configure Email Settings**. Then use the **Email Handler** section. |
| Enable Lookout | |
| Set Lookout as My Site Home Page | |

## 1.29.3 Upgrading video stream

New versions of Video Stream can be used to upgrade components which were installed on a server.

Running the installer automatically upgrades those components using the same options of the original installation after clicking the **Upgrade** button.

# 1.30 Installing AppFabric for Aurea Social

This is an installation guide for AppFabric for Aurea Social.

## 1.30.1 Why use Windows Server AppFabric cache?

AppFabric cache for Windows Server is a distributed cache environment that can be shared across multiple servers.

It eliminates the problem of caching to memory on individual servers in a multi-front-end scenario, which could cause data discrepancies among your front-end servers.

AppFabric cache allows the following enhancements to the Aurea Social Software:

- Suggest Ahead capabilities. Suggest Ahead queries the cache as you type to suggest similar posts, questions and communities.
- Activity Stream caching. This can speed up the loading of the Activity Stream by several seconds.
- Community Activity Stream caching (introduced in v5.2). This also speeds up the loading of the Community Activity Stream.

## 1.30.2 Pre-requisites

Below are the pre-requisites to installing App fabric on Aurea Social:

- .Net 4.0 Installed
- AppFabric Service Account and Password (typically a domain account). This account needs no special rights as the AppFabric configuration will assign appropriate rights.
- A Microsoft SQL instance on which to host the AppFabric configuration database. The account you are logged into the server with needs to be able to create databases and assign security rights on that SQL instance.

Alternatively, the configuration could live in an XML document on a file share. In the case of the XML on a file share, the AppFabric service accounts needs read/write access to that file share.

## 1.30.3 Installation and configuration

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

It is recommended that AppFabric Cache be installed on a server of its own with a minimum of 4 gigs of RAM.

Windows Update service must be running.

Execute the UI based installer.

## 1.30.4 Install AppFabric

Below are the steps to install AppFabric:

1. Remotely access each of the App Fabric Servers.
2. Copy the AppFabric Installer to the local system.
3. Copy `AppFabricSitrion.zip` to the local system. Right-click, choose properties and unblock if needed.
4. Extract AppFabricSitrion.zip to the local system.
5. Ensure that the Window Update Service is running. Open `Services.msc`.

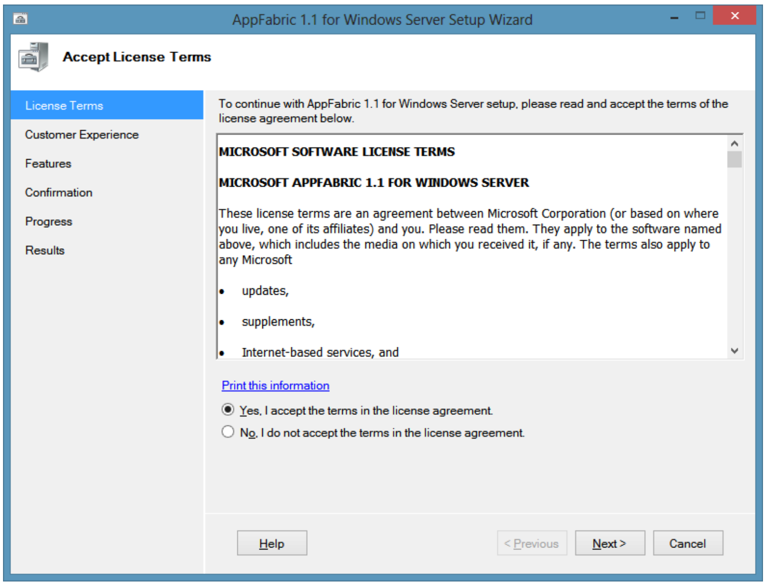
6. Scroll down and find Windows Update. Start it if it is not already started.

7. Open Windows Explorer.

8. Navigate to the folder where the Ap Fabric install file is located

9. Execute UI Installer.

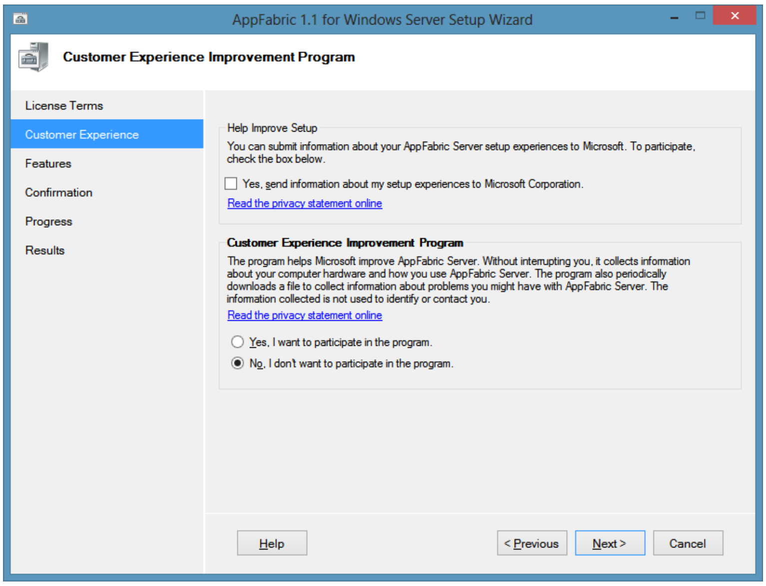
10. The first Screen, **Accept License Terms** is displayed.




*Screenshot 72: Accept license terms screen*

11. Select Yes, I Accept the terms in the license agreement. Click **Next**.

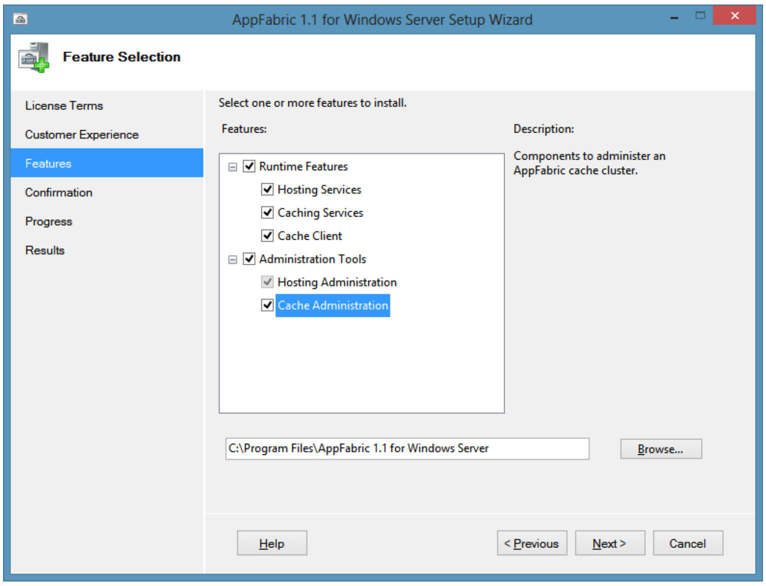
12. The next screen, **Customer Experience Improvement Program** is displayed.




*Screenshot 73: Customer Experience Improvement Program page*

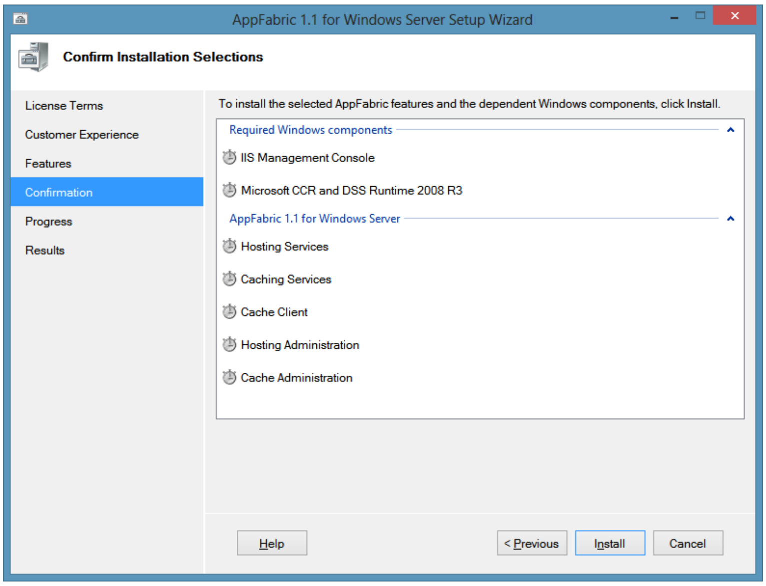
13. Click **Next**. **Feature Selection** screen is displayed.

14. Select all option on **Feature Selection** screen and click **Next**.



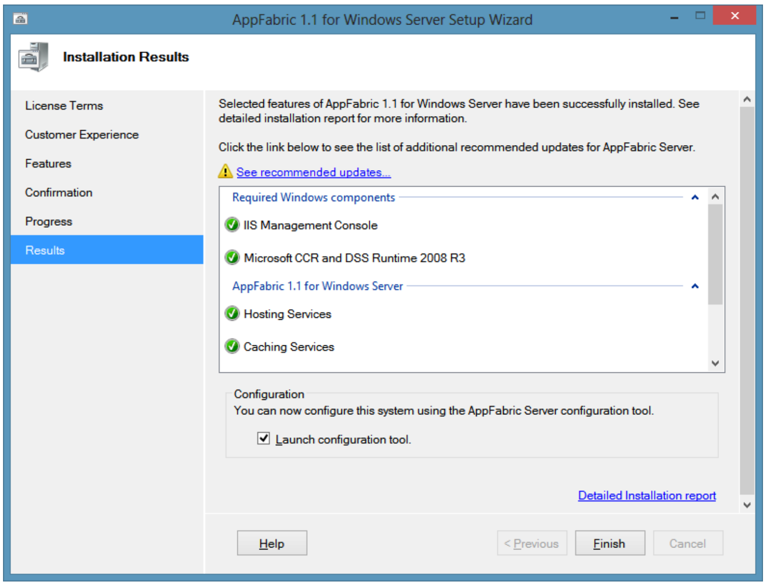

*Screenshot 74: Enable all check boxes*

15. **Confirm Installation Selections** screen is displayed. Click **Install**.




*Screenshot 75: Confirm Installation Selections screen*

16. The installer displays the progress screen during the installation and then displays **Installation Results** screen.

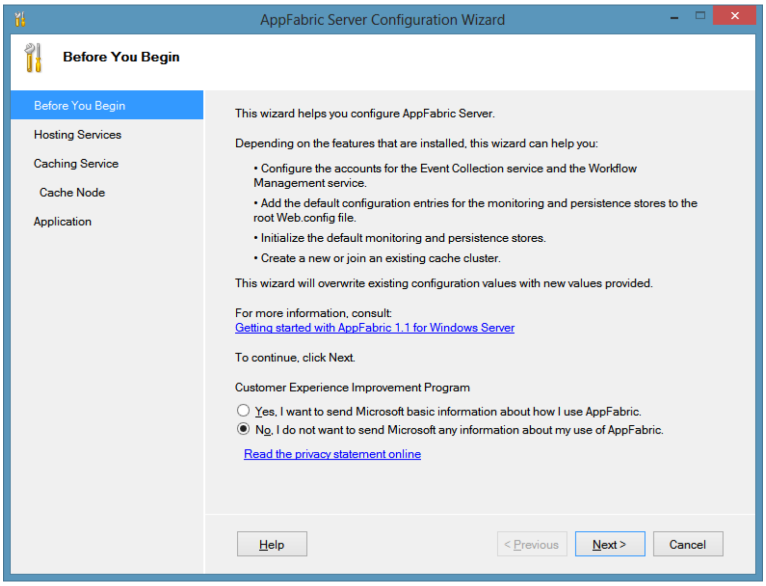



*Screenshot 76: Installation Results screen*

17. Ensure **Launch configuration** tool is ticked and click **Finish**.

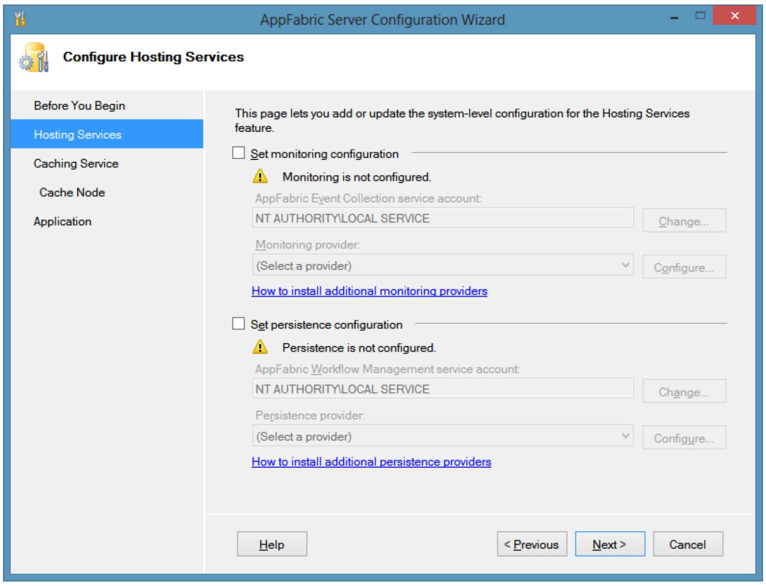
AppFabric Server configuration Wizard opens and the screen **Before you Begin** is displayed.

1. On **Before you Begin** screen click **Next**.




*Screenshot 77: Configure Hosting Services*

2. **Configure Hosting Services screen** is displayed. Click **Next**.

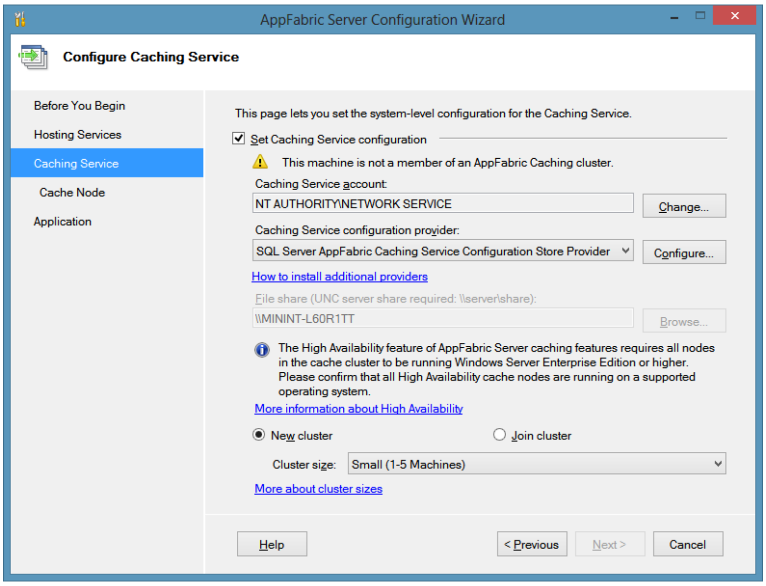



*Screenshot 78: Configure Hosting Services screen*

3. **Configure Caching Service** screen is displayed. Check the following values:

» Tick the box next to **Set Caching Service configuration**.

» Click on Change next to the **Caching Service account**.




*Screenshot 79: Configure Caching Service*

4. **Select User** screen is opened. Click on **Custom account > Browse** and fill in the correct **AppFabric Service** account. Once the account is selected the Password field is enabled. Enter the password for the account and click **OK**

5. Select **SQL Server AppFabric Caching Service Configuration Store Provider**. Then click **Configure**.

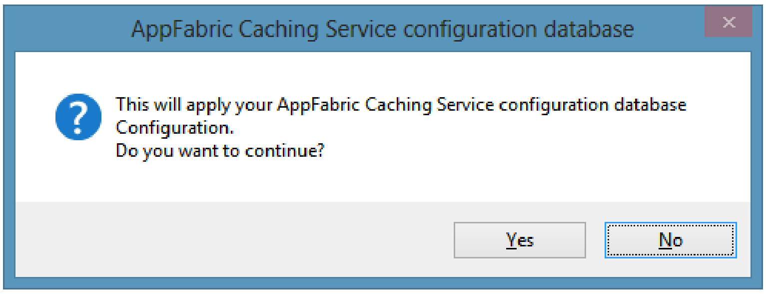
Alternatively, you may use the XML provider. This requires that you have a file share accessible from the AppFabric server where it may store the configuration XML. The AppFabric account must have read/write access to this share.

6. AppFabric Server Caching Service configuration Store is opened. If this is the first AppFabric server to be installed, Click **Create AppFabric Caching Service configuration database**.

Otherwise click Register AppFabric Caching Service configuration database. Then fill in fields with the following Values.

- **Server:** <Microsoft SQL Server Instance>
- **Database:** SitrionAppFabric

7. Click **Ok** If running the configuration on another server than the first, a message box will appear asking:



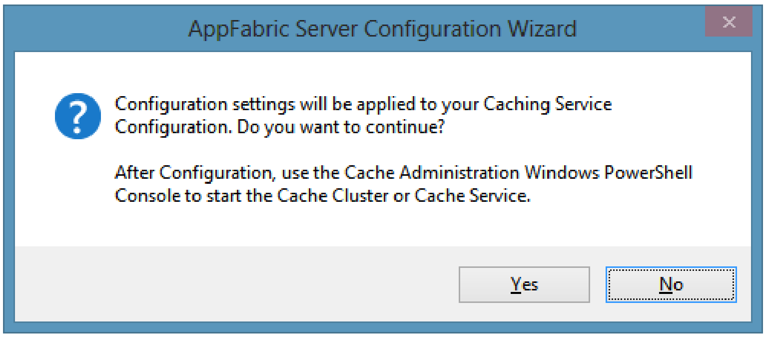

8. Click **Yes**.

9. If running the configuration on the first AppFabric server, select New cluster. Otherwise select Join cluster. For a new cluster size, select the size containing the number of AppFabric servers that will be in the cluster. Typically, this is small.

10. Click **Next**.

11. The screen **Configure AppFabric Cache Node** appears. Ensure options AppFabric Server: AppFabric Caching Service and Remote Service Management are ticked. Click **Next**.

12. A confirmation screen appears. Click **Yes**.




13. Once configured the Configure Application screen is displayed. Uncheck **Start Intemet Infomation Services (IIS) Manager** and click **Finish**.

## 1.30.5 Configure services Startup mode

Execute the following steps on every AppFabric server.

1. Open `Services.msc`.

2. Find the **AppFabric Caching Service**, right click, choose **Properties**.

3. Set the startup type to automatic.

4. Click **Start** to start the service.

5. Click **Apply** then **OK**.

6. Repeat these steps on each AppFabric server.

### 1.30.6 Configure AppFabric cache host

1. To create the cache host, open a Caching Administration PowerShell window on the First AppFabric Server. Then execute the following commands:

```
New-Cache –CacheNameSitrionSocial

Start-CacheCluster

Get-CacheHost
```

2. `Get-CacheHost` yields a list of cache hosts configured. Please ensure you copy the value of the Column HostName :PortNumber as this data is needed at a later stage.

3. Remove the Default cache as it is no longer used. In the Caching Administration Powershell window, execute the following command:

`Remove-Cache -CacheName default`

4. Set the cache-size to the amount of memory the server has, reserving at least 2Gb minimum for the OS (for example, set a cache size of 14 Gb for a server with 16 Gb of RAM).A cache size of 16 Gb or less is recommended to minimize latency.

```
Stop-CacheCluster

Set-CacheHostConfig –HostNameyourappfabricservernamehere.com -CachePort 22233 -
CacheSize16384

Start-CacheCluster
```

### 1.30.7 Grant Application Pools access to the Cache

To grant the Application pools access to the cache, open a Caching Administration PowerShell window on the First AppFabric Server. Then execute the following commands:

1. Grant your Web Application Pool ID(s) for your web applications and the Aurea Social Services application pool access to the cache.

2. Open a Caching Administration PowerShell window, right click to run as administrator.

3. For each account, run:

```
Grant-cacheallowedclientaccount domain\username
```

### 1.30.8 Update AppFabric

1. As of the writing of this document, the latest update for AppFabric is CU 7. You may download it here: https://support.microsoft.com/en-us/kb/3092423

2. Run the Cumulative Update on each AppFabric server. In some instances, the update may take 15-20 minutes where it appears that it is doing nothing with a cmd prompt window. Be patient and wait for a screen to pop up indicating that the update has completed.

3. Reboot each AppFabric server.

### 1.30.9 Copy and install AppFabric libraries to all SharePoint servers

Delete this text and replace it with your own content.

1) Remote in to the SharePoint Central Admin server:

» This step is to be done in one SharePoint server only and it copies App Fabric libraries to all SharePoint servers and registers them to be used by Aurea Social caching infrastructure.

2) If you are running on a CU of AppFabric other than CU 7 you need to copy the following dll files from the AppFabric install directory (typically `C:\Program Files\AppFabric 1.1` for Windows Server) to the location where you extracted the `AppFabricSitrion.zip`, in a folder call App Fabric Classes, replacing the `.dlls` in that folder.

» `Microsoft.ApplicationServer.Caching.Client.dll`

» `Microsoft.ApplicationServer.Caching.Core.dll`

» `Microsoft.WindowsFabric.Common.dll`

» `Microsoft.WindowsFabric.Data.Common.dll`

3) Manually copy the App Fabric Classes folder to each server Sharepoint server. Then, on each server, run as Administrator a cmd prompt, change directory to where you copied the App Fabric classes folder and use `gacutil.exe` to place each `.dll` in the gacac (there are example in `GACUTILExamples.txt` that are untouched by Word auto formatting):

» `gacutil.exe -i“c:\locationtofolerhere\App Fabric Classes\Microsoft.ApplicationServer.Caching.Client.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.ApplicationServer.Caching.Core.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.WindowsFabric.Common.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.WindowsFabric.Data.Common.dll”`

4) Ensure that on each Sharepoint server the `.dlls` listed in `Sitrion\app` fabric classes are added to the gac (`C:\windows\assembly`) on each SharePoint serverConfigure Sitrion to Use AppFabric cache

### 1.30.10 AppFabric configuration in Aurea Social

1. Navigate to **Central Administration->Manage Service Applications**.

2. Click on NewsGator Social Platform Services Proxy.

3. Click on **Manage**.

4. Scroll down until you see **Manage Cache Settings**.

5. Click under the right column on option **Manage Cache Settings**.

6. Fill the cache settings form using the values from the Get-CacheHost cmdlet.

a. Check the checkboxes **SuggestAhead Caching**, **Content Caching** and **Community Caching**.

b. Cache Server address: this is the ip or servername followed by the port. You can obtain this information by running the `Get-CacheHost cmdlet` in the Caching Administration Powershell window.

c. Cache Name:Aurea Social

d. Cache Service Account Type:DomainAccount.

e. Channel Open Timeout: Leave as default 3000 ms.

f. Compression Enabled: No.

g. Diagnostic Tracing Enabled: No.

h. Max Connections to Server: Set this to the number of cores available to your app Fabric server

i. Request Timeout: Leave this as the default 10000 ms.

j. Max Queue Length: Leave this as the default 60000 ms.

k. Poll Interval: Leave this as the default 300 seconds.

l. Local Cache Enabled: No.

m. Security Mode: Transport.

n. Protection Level: Encrypt and Sign.

o. Transport Properties: Leave every property in this section as the default value.

p. Click **Save**.

7. Reboot all SharePoint servers.

## 1.30.11 Next steps and verification

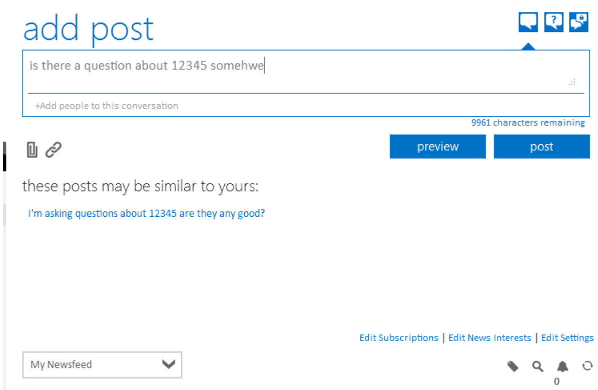
The next time the “NewsGator Suggest Ahead Builder Job” runs, the cache is filled. You can get immediate results by manually running the job. You can also update the job frequency to every 15 minutes if you desire but we do not recommend running it more frequently than that.

To verify that the cache has gathered data from Aurea Social, remote desktop to the AppFabric server, start the **Caching Administration Powershell** as administrator, and type the following command:

```
Get-CacheStatistics -CacheNameSitrionSocial
```

Size and items should not be 0.

To test that Suggest Ahead is functional, start typing a post that contains a similar word to another recent post in the system. As you are typing, you’ll see results similar to the following:




*Screenshot 80: Example for suggest ahead function*

## 1.30.12 Troubleshooting

Below are some of the error you may get when trying to install AppFabric on Aurea Social:

## 1.30.13 Timeouts

You may get below error in the Event Viewer:

```
AppFabricCache.Get(key, region) Region: NGCommonCache Error: Microsoft.Ap-
plicationServer.Caching.DataCacheException:
ErrorCode<ERRCA0018>:SubStatus<ES0001>:The request timed out
```

You can tweak the timeout settings for the service app to increase to 500 for example.

`SocialSitesCacheConfig.zip` is included in the download.

Then in a command prompt run

```
.\SocialSitesCacheConfig.exe -CacheRequestTimeout 500
```

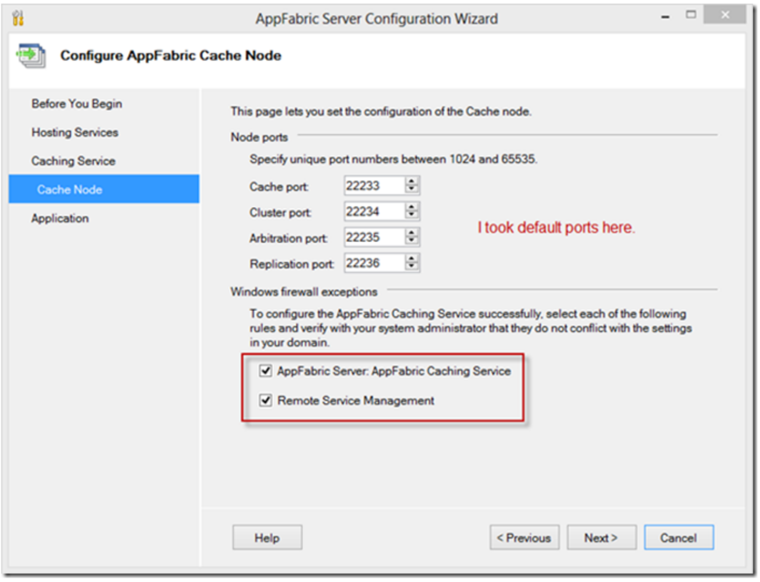
If you're still experiencing issues, you'll probably need to increase the `maxConnectionsToServer` in the `web.config` of the web application.

To do this, one must modify the `web.config` to include these elements:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<!--configSections must be the FIRST element -->
<configSections>
<!-- required to read the <dataCacheClient> element -->
<section name="dataCacheClient"
         type="Microsoft.ApplicationServer.Caching.DataCacheClientSection,
Microsoft.ApplicationServer.Caching.Core, Version=1.0.0.0,
            Culture=neutral, PublicKeyToken=31bf3856ad364e35"
allowLocation="true"
allowDefinition="Everywhere"/>
</configSections>

<dataCacheClientrequestTimeout="15000" channelOpenTimeout="3000" maxCon-
nectionsToServer="100">
<localCacheisEnabled="true" sync="TimeoutBased" ttlValue="300" objectCount="10000"/>
<clientNotificationpollInterval="300" maxQueueLength="10000"/>
<hosts>
<host name="CacheServer1" cachePort="22233"/>
<host name="CacheServer2" cachePort="22233"/>
</hosts>
<securityProperties mode="Transport" protectionLevel="EncryptAndSign" />
<transportPropertiesconnectionBufferSize="131072" maxBufferPoolSize="268435456"
maxBufferSize="8388608" maxOutputDelay="2" channelInitializationTimeout="60000"
receiveTimeout="600000"/>
</dataCacheClient>
</configuration>
```

### 1.30.14 Firewall

During the install process it is very important that you choose the option to include the Firewall rules for AppFabric (see red box in below screenshot).



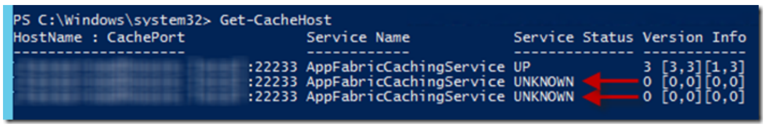

*Screenshot 81: AppFabric Server Configuration Wizard*

However, even with these in place you still have Firewall problems if Ping is not enabled—your cache nodes cannot communicate.

An easy way to determine this is to run “`Get-CacheHost` and see if any nodes’ statuses come back as “Unknown” (as seen in the below screenshot).

This can be an indication of other network problems of course, but it definitely shows this way if you have the problem I am describing.

*Screenshot 82:*




The ping command uses the ICMP protocol. So, you need to add an inbound rule on all of the servers in your cache cluster to allow incoming ICMP traffic. Once I did this, my three cache nodes could communicate with one another as expected.

### 1.30.15 Domain accounts running the caching service

It is well documented that you have to grant access to any client accounts that you want to use to write to AppFabric through the PowerShell `Grant-CacheAllowedClientAccount` command—and these of course can be Domain Accounts.

However, if you chose a Domain account to run the AppFabric caching service when you installed it, rather than a built-in account like NETWORK SERVICE, then you have to add one small attribute to any client application’s config file that communicates with AppFabric or that application cannot communicate with AppFabric successfully.

You must include the `dataCacheServiceAccountType` attribute on your `dataCacheClient element`, and set it to a value of DomainAccount as shown in the below example.

```
<dataCacheClientdataCacheServiceAccountType="DomainAccount">
<hosts>
<hostname="127.0.0.1"cachePort="22233"/>
<hostname="127.0.0.1"cachePort="22233"/>
<hostname="127.0.0.1"cachePort="22233"/>
</hosts>
</dataCacheClient>
```

Even if all other configuration, permissions, and firewall rules are in place—your client applications cannot interact with AppFabric cache unless you explicitly tell them that a DomainAccount is running the service with this small configuration attribute.

## 1.30.16 Could not load Microsoft.ApplicationServer.Caching.sql provider

**Error**

```
Use-CacheCluster :ErrorCode:SubStatus:Provider "System.Data.SqlClient" instantiation
failed: Could not load file or assembly 'Microsoft.Ap-
plicationServer.Caching.SqlProvider, Version=1.0.0.0, Culture=neutral, PublicKeyToken-
n=31bf3856ad364e35' or one of its dependencies. The system cannot find th e file
specified. At line:1 char:62 + Import-Module DistributedCacheAdministration;Use-
CacheCluster<<<< + CategoryInfo : NotSpecified: (:) [Use-CacheCluster], DataCacheEx-
ception + FullyQualifiedErrorId :

 ERRCMS0007,Microsoft.ApplicationServer.Caching.Commands.UseCacheClusterCommand
```

**Resolution**

The error is because there is a missing entry for the Required Assemblies section in the configuration file (`C:\Program Files\AppFabric 1.1 for Windows Server\PowershellModules\DistributedCacheAdministration\DistributedCacheAdministration.psd1`) of the `DistributedCacheAdministrationPowershell` module.

Simply added the missing DLL in the configuration file solve the issue:

```
@{ ModuleVersion = '1.0' GUID = 'e0f1ac07-c706-4b65-ac0b-63ac0ab31237' Author =
'Microsoft Corporation' CompanyName = 'Microsoft Corporation' Copyright = '(c)
Microsoft Corporation. All rights reserved.' Description = 'Microsoft AppFabric Cach-
ing Administration module' PowerShellVersion = '2.0'RequiredAssemblies=

"..\..\Microsoft.ApplicationServer.Caching.SqlProvider.dll",
"..\..\Microsoft.ApplicationServer.Caching.Management.dll", "..\..\Mi-
crosoft.ApplicationServer.Caching.Server.dll", "..\..\Mi-
crosoft.ApplicationServer.Caching.Core.dll",
"..\..\Microsoft.WindowsFabric.Common.dll", "..\..\Microsoft.WindowsFabric.Data.dll",
"..\..\Microsoft.WindowsFabric.Data.Common.dll", "..\..\Mi-
crosoft.WindowsFabric.Federation.dll" TypesToProcess = @() FormatsToProcess =
'Microsoft.ApplicationServer.Caching.ManagementPS.format.ps1xml' NestedModules =
'Microsoft.ApplicationServer.Caching.ManagementPS' CmdletsToExport = '*'
```

# Aurea Social administration

This Administration Guide covers procedures for both technical administrators and business administrators.

This Administration Guide is part of a set of documents for using and managing Aurea Social, covering both the core product and all optional modules.

## 1.31 Modules in version 5.5

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 Aurea 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 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.

## 1.32 Solution in version 5.5

In version 5.5, the solutions are:

**Innovation**: The Innovation Solution supports the crowd sourcing, vetting 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 targeting and measuring the effects of communications.

## 1.33 Turning on and configuring diagnostic logging

It is recommended to turn on diagnostic logging for Aurea Social.

For normal operation, it is recommended to set the logging level to **Warning**; for debugging, to **Information**. Follow the below steps to do that:

1. From Central Administration, click **Monitoring > Configure Diagnostic Logging**.

2. In the **Event Throttling** section, expand NewsGator Social Sites to see what the current logging levels are for Aurea Social jobs and services.

3. 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**.

# 1.34 Managing the Aurea Social platform and installation

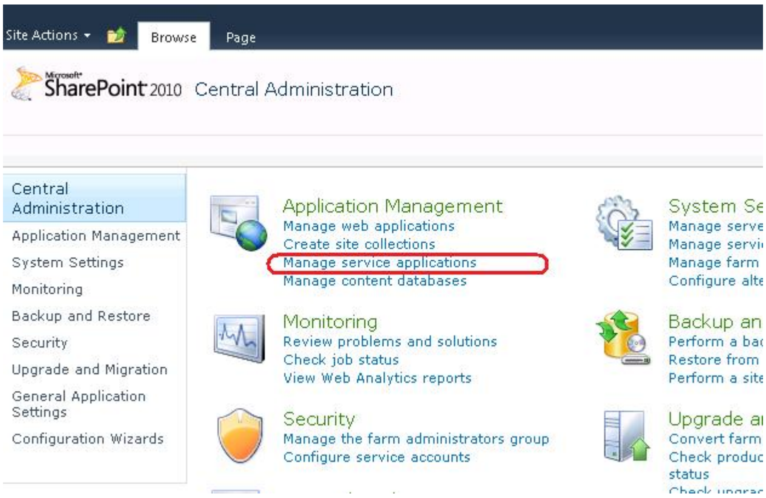
Apart from settings for any optional modules, much of the administration of Aurea Social is centralized on a single page in SharePoint, the **NewsGator Social Platform Management** page.

Turn to this page after install of Aurea 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 Aurea Social installer, and to change the behavior of Aurea Social.

## Getting to the NewsGator Social Platform Management page

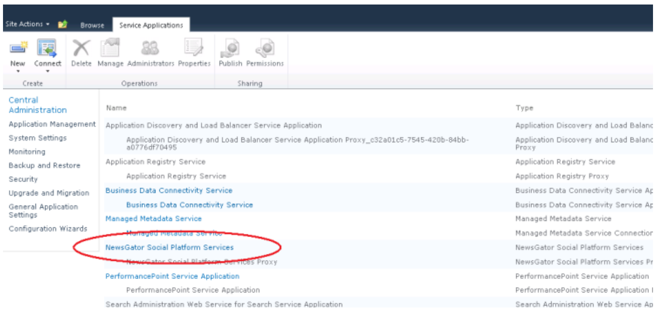
1. Open SharePoint Central Administration.

2. Under the **Application Management** area, click the **Manage Service Applications** link.



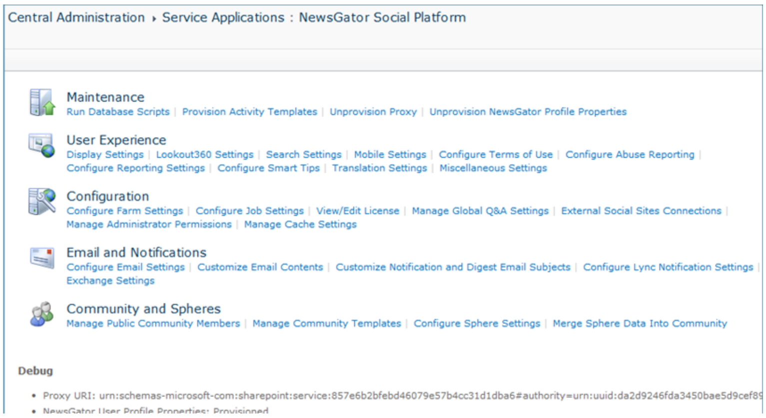

*Screenshot 83: Click Manage Service Applications*

3. Click on **NewsGator Social Platform** Services.




*Screenshot 84: Click NewsGator social platform*

4. NewsGator social platform window is displayed.




*Screenshot 85: NewsGator social platform window*

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 Aurea Social

You can adjust the length of time Aurea Social keeps the data it records, using the **Job Configuration** section. For further details, see Job Configuration.

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 Aurea Social automatically sends to users, and in the **Miscellaneous Settings** section you can turn on or off certain Aurea Social behaviors.

## Troubleshooting

Many sections on this page have some troubleshooting information to display. Just after completing a successful installation of Aurea Social, everything on this page shows 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 re-provision on this page. You can 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 Aurea 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 Aurea 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.

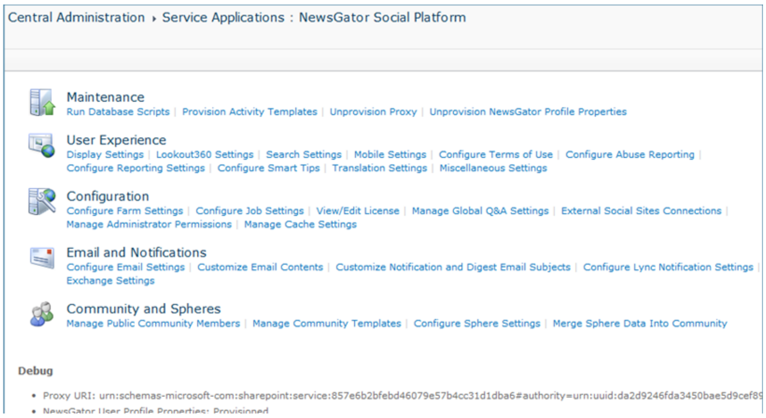
What's described in **Database Maintenance**, **Activity Templates**, **NewsGator user Profile Properties**, and **Email Handler** allow you to repeat what is done in the Provision Social Service Application task, and in the latter three cases, undo a portion of it.

These are selected on the **Installation Option Selection** page of the installer.

For more details on each of these, see section-by-section breakdown.

# 1.35 NewsGator Social Platform Management Page

Below are the section wise description of the NewsGator Social Platform Management Page:




*Screenshot 86: NewsGator social platform management page*

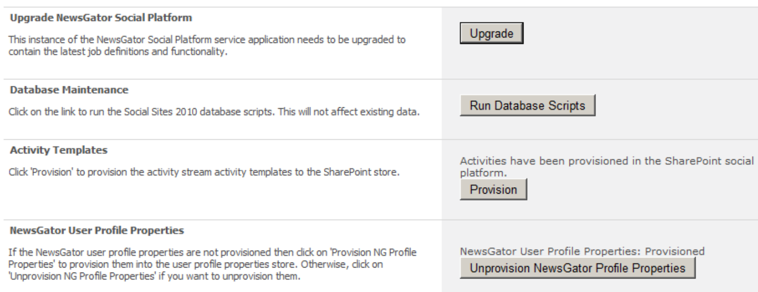
## 1.35.1 Maintenance section

Maintenance section consists of the following:

- Run Database Scripts
- Provision Activity Templates
- Unprovision Proxy
- Unprovision NewsGator
- Profile properties

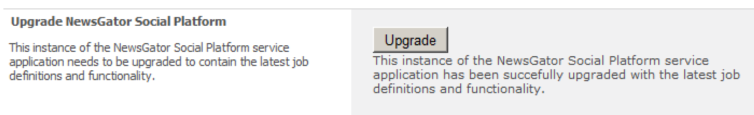

*Screenshot 87: Maintenance section*

Each of the links in the Maintenance section brings you to the same administrative page as below:




*Screenshot 88: Administrative page for maintenance section*

### Upgrade Platform section




*Screenshot 89: Upgrade platform message*

The same message is displayed in red in the main management page when there is a version discrepancy. It can be resolved by clicking the **Upgrade** link to the right.

Once resolved, this message no longer appear. If you've deployed Aurea Social using the Aurea Social installer, you never see this section.

## Service Application Proxy section


*Screenshot 90: Service application proxy section*

The S**ocial Service Application Proxy** is an essential component of Aurea 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 Aurea Social.

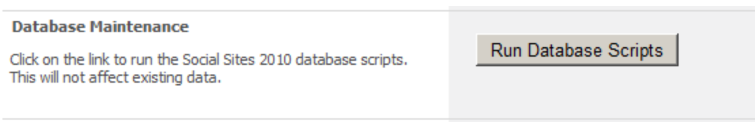
If NewsGator web parts are displaying error messages where they should be displaying data, and/or if you see warnings in your SharePoint server's application event log referring to communication problems with the **NewsGator Social Service Application** or the NewsGator Social Service Application Proxy, 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 re-provisioning 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 see an **Unprovision** button here, and the Proxy's URI is displayed.

While it is possible to create a configuration in which front-end to back-end communication occurs without this proxy provisioned, in supported Aurea 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




*Screenshot 91: Database maintainence section*

When you are installing or upgrading Aurea 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 Aurea 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.

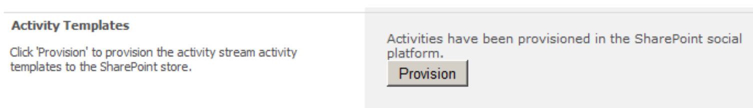
To rerun them, do the following:

1. Go to the **Database Maintenance** section

2. 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




*Screenshot 92: Activity template section*

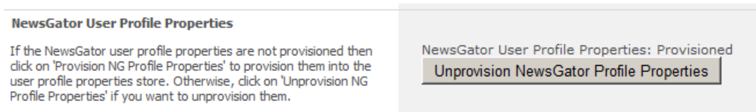
SharePoint 2010 provides users with an activity stream, which alerts users to the activity of other users in the system. However, SharePoint 2010 does not report on all types of user activity.

Aurea 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 Aurea 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




*Screenshot 93: 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 Aurea Social to customize each user's experience.

These properties are added during the Provision Social Service Application task in any install or upgrade of Aurea Social.

In version 1.0, the only property added is a setting to allow or disallow notification emails.

If NewsGator profile properties do not appear in SharePoint user profiles, do the following:

1. Go to **NewsGator User Profile Properties** section of the **NewsGator Social Platform** management page and look at the status of the NewsGator User Profile Properties.

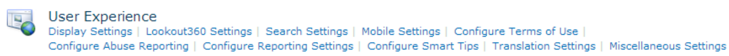
2. If not provisioned, you should see a **Provision NG Profile Properties** button.

3. 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.

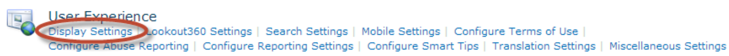
## 1.35.2 User Experience section

**User Experience** section consists of the following:



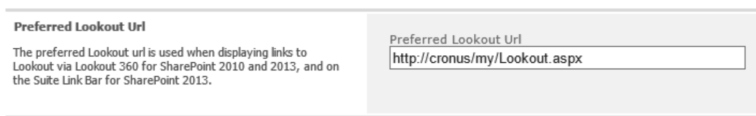

*Screenshot 94: User Experience section*

### Display Settings page




*Screenshot 95: Display settings*

### Preferred Lookout URL




*Screenshot 96: 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**.

In **Preferred Lookout Url** field, enter 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

1. On the Display Settings page, specify the lookout page color by clicking **Color** on **Tile Style Settings**. A box with default colors is displayed.


*Screenshot 97: Tile Style Settings*


*Screenshot 98: Select color*

2. 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.

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.

3. Edit the text to the desired value, then press **ENTER** to complete the color customization.

4. 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 Aurea Social web parts

Clicking the **Apply to Other Aurea Social Web Parts** checkbox applies the selected color to other Aurea Social web parts and enable a "tile style" for those web parts.

This gives a consistent look and feel across all of Aurea Social including the Lookout page. Tile style is not supported for users with Internet Explorer 7. If your organization has Aurea 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

Click the **Apply to SharePoint Title Bar** checkbox to 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.

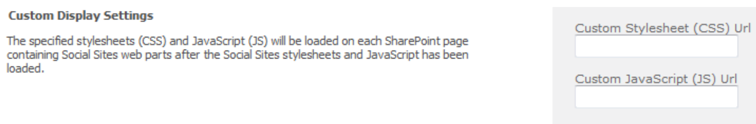
Click **Save** at the bottom of the page to apply this color to the user interface. It takes a few minutes before this change can be seen in the UI.


*Screenshot 99: Color of the title bar is changed*

## 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 Aurea 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.

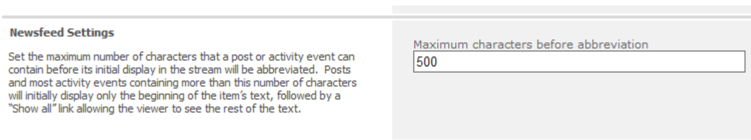



*Screenshot 100: Custom Display Settings*

## Controllable post length

This feature lets 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.

This can be set in the **Newsfeed Settings** section of the **Display Settings** page.




*Screenshot 101: Newsfeed Settings*

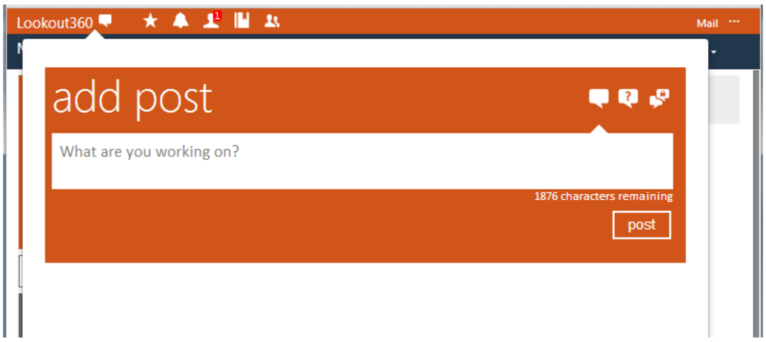
> **Important:**
> Sometimes @targets can happen early in a post, so setting to very short display lengths (under 250 characters) is not recommended.
> In early testing, 300 – 500 characters worked well for many users.

## Lookout360 settings page

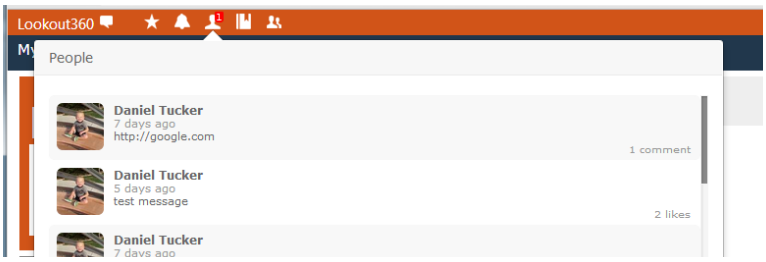
**Lookout360** is a toolbar that is placed at the top of web pages to let users post, monitor and respond to stream items from any page. It has configuration to turn it on across a SharePoint farm via Central Admin, and it can also be implemented on other web pages (for example, a legacy intranet site) 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 some screenshots.



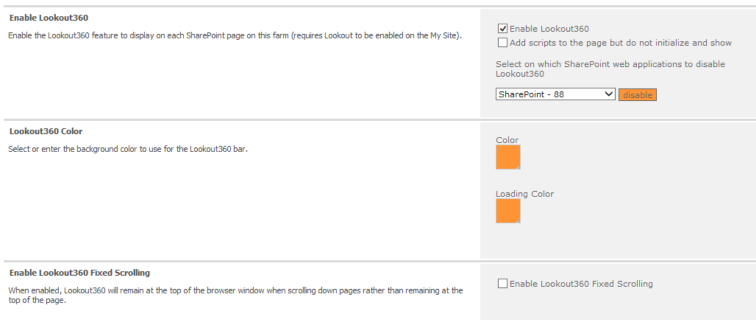

*Screenshot 102: Users can create microblogs, questions and private messages from this control.*




*Screenshot 103: 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 websites 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.




*Screenshot 104: Lookout360 Settings*

The first section of settings (Enable Lookout360) controls whether and where Lookout360 shows.

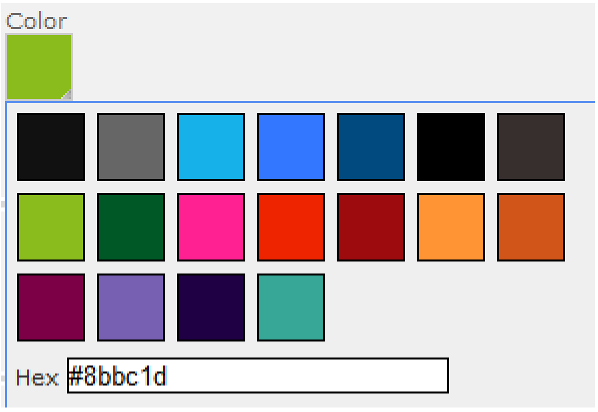
The **Enable Lookout360**, turns on Lookout360 across your SharePoint farm. This causes the toolbar to display on nearly every page (excluding some administrative and editing pages.)

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 (for example, 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.

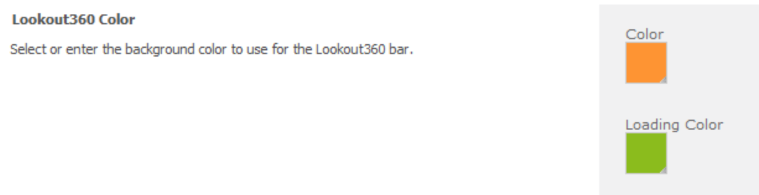
The **Lookout360 Color**, allows you to pick the background color that the **Lookout360** bar has while it is loading, and to pick a separate color for it to have after it has completed loading. Choosing a different loading color will give users a clear visual cue on when Lookout 360 has completed loading.

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




*Screenshot 105: Pick a color or enter a hex code for a specific color.*

Below is an example of what users see. In this example, green is selected for loading while orange is selected for display.




*Screenshot 106: Green is selected for loading and orange for display*

This results in a brief display of a green bar as the Lookout360 bar is loading at the top of a page.


*Screenshot 107: Green bar*

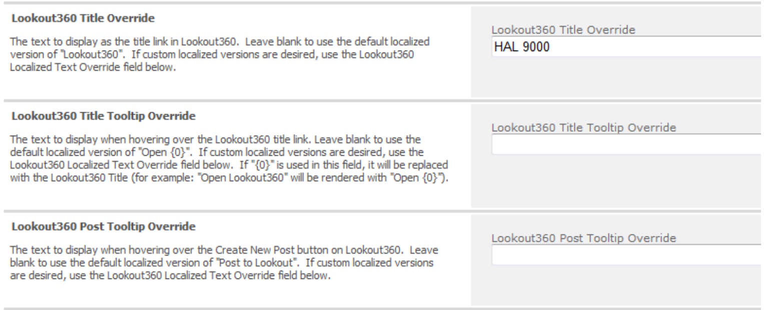
This is quickly followed by the actual orange Lookout360 bar.


*Screenshot 108: Actual orange 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.

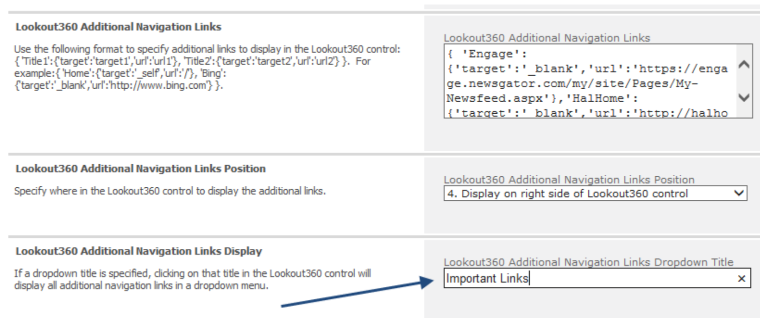



*Screenshot 109: controls for specifying text to display for title and tooltips*

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.

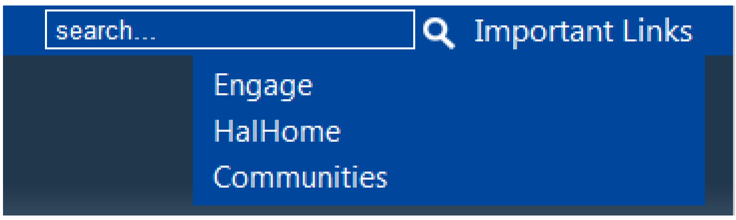

*Screenshot 110: Controls for displaying post controls, search box, positioning of elements, display of additional links*

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.




*Screenshot 111: Lookout360 Additional Navigation Links Display*

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.

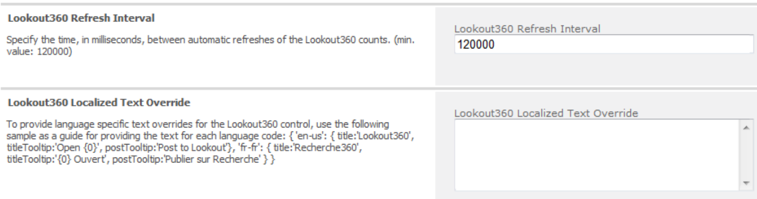



*Screenshot 112: Additional navigation links*

**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.




*Screenshot 113: Controls the frequency of updates*

## Search Settings

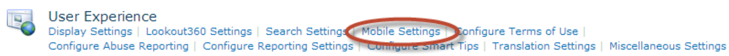

*Screenshot 114: Search Settings*

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.


*Screenshot 115: Search Settings page*

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

## Mobile Settings page




*Screenshot 116: Mobile settings*

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

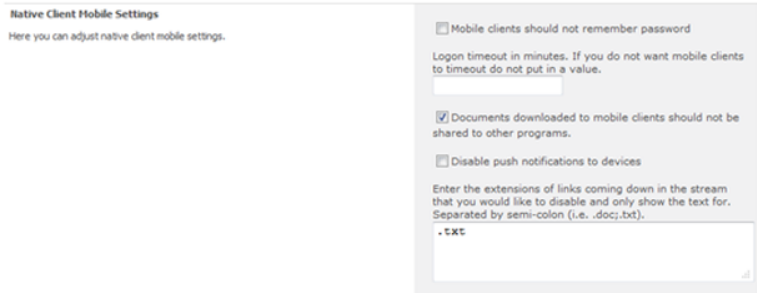
There are two distinct kinds of mobile clients:

- 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 smart phone

Most smart phones can 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.



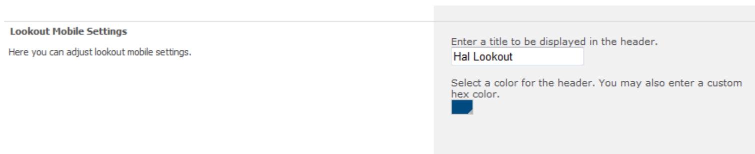

*Screenshot 117: Native client mobile settings*

| Fields | Description |
|---|---|
| Mobile clients should not remember password | With this checkbox is enabled, mobile clients are forced to forget the user's password.<br>This means that users 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 do not need to re-enter their password every time they login. |
| Logon timeout in minutes | With a number value in this box, client applications is caused to log out after the number of minutes specified.<br>When left blank, client applications is not caused to time out. |
| Documents downloaded to mobile clients should not be shared to other programs | Enable this checkbox to limit abilities users have to work with or view downloaded files on their smart phones.<br>» 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.<br>» 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. |
| Disable push notifications to devices | If checked, this checkbox stops those notifications which users choose to receive in Aurea Social from also being pushed to the iPhone and Android clients.<br>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. |
| **Enter the extensions of links …** | This file extension box allows administrators to specify which types of files should not be linked in the activity stream on the mobile phone.<br>They do this by specifying the file extensions (such as .docx) of those types of files.<br>This is another mechanism to limit users' abilities to interact with files stored on SharePoint.<br>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.




*Screenshot 118: Lookout mobile settings window*

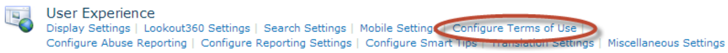
The title setting is intended to give a simple branding experience to help users know this interface is part of their broader intranet / Aurea Social deployment.

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




*Screenshot 119: Configure term of use page*

You may 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 displays a message.


*Screenshot 120: Activity stream*

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 termsof use, and put these in place before activating this feature.

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

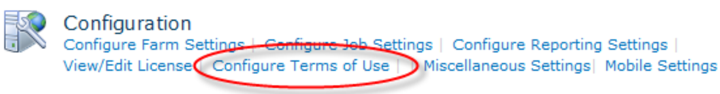
### Creating a new English – US version of your terms of use

When activated, the Terms of Use feature requires a US English version of the terms of use, as this is the version that is 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.

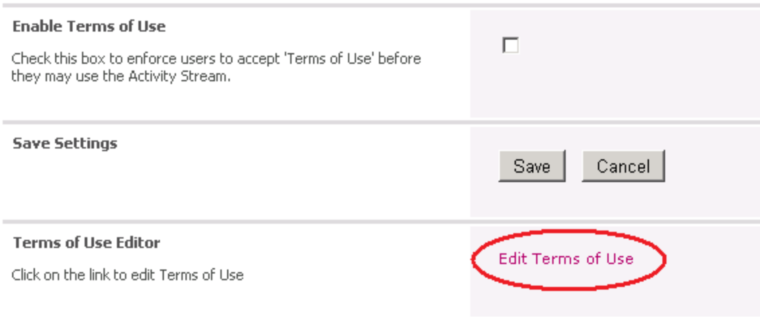
> **Note:**
> Consult your legal team to produce your own, and then replace the example version with your own by following the steps below.

1. From the **Social Platform Management** page, click **Configure Terms of Use**.




*Screenshot 121: The Terms of Use configuration page appears.*

2. In the **Terms of Use Editor** section, click on **Edit Terms of Use**. The Terms of Use version list appears. Out-of-the-box, this contains only the **en-US (English – United States)** version.

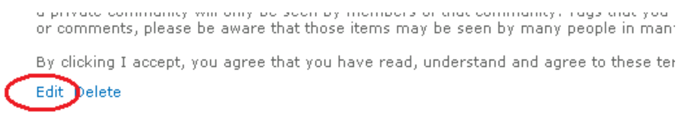



*Screenshot 122: Click on **Edit Terms of Use***

3. Click **Edit** next to the en-US version of the Terms of Use. The page for viewing the selected terms of use appears.

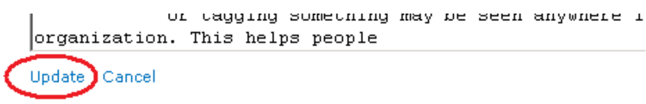

*Screenshot 123: Click **Edit***

4. Click the **Edit** link at the bottom. The page for editing the selected terms of use appears.



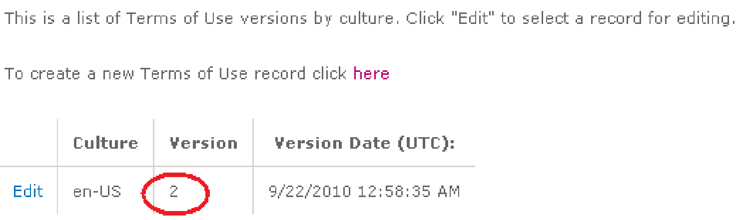

*Screenshot 124: Click **Edit** to display page for editing terms of use.*

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. You are returned to the Terms of Use version list.




*Screenshot 125: Click Update*

6. Notice that the version has been incremented automatically for the en-US language/culture.




*Screenshot 126: Version is incremented*

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

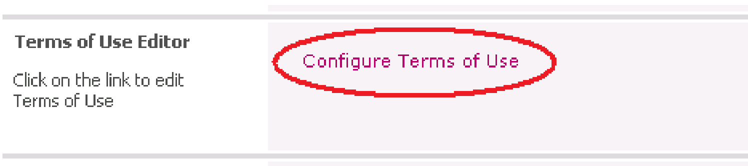
You can simultaneously have terms of use in multiple languages.

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 Aurea 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 (Poland)
- 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)

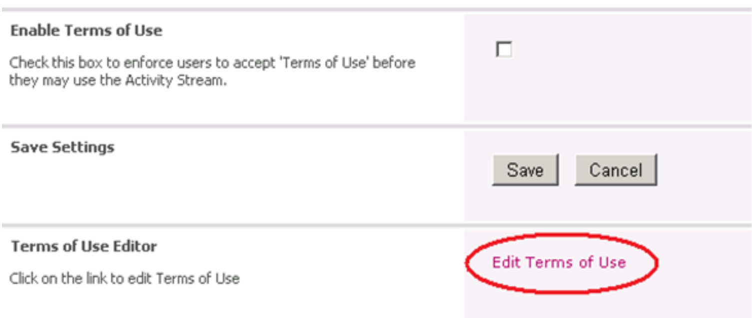
To create terms of use in other non-english language, follow the below steps:

1. From the Social Platform Management page, click Configure Terms of Use. The Terms of Use configuration page appears.



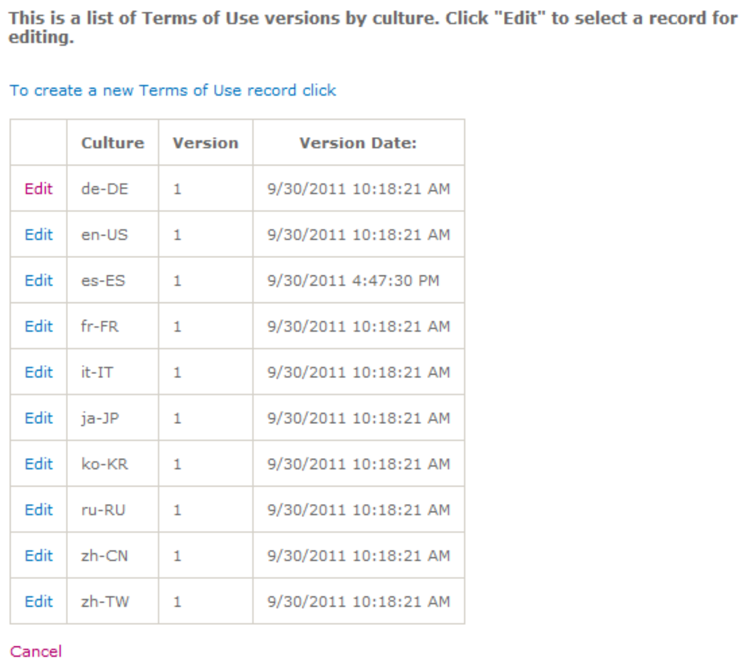

*Screenshot 127: Click Configure Terms of Use*

2. In the **Terms of Use Editor** section, click on **Edit Terms of Use**. The **Terms of Use** version list appears. Out-of-the-box, this contains a default **Terms of Use** in ten different languages.




*Screenshot 128: Click **Edit Terms of Use***

3. Click **To create a new Terms of Use record click** at the top. The page for entering a new terms of use appears.


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

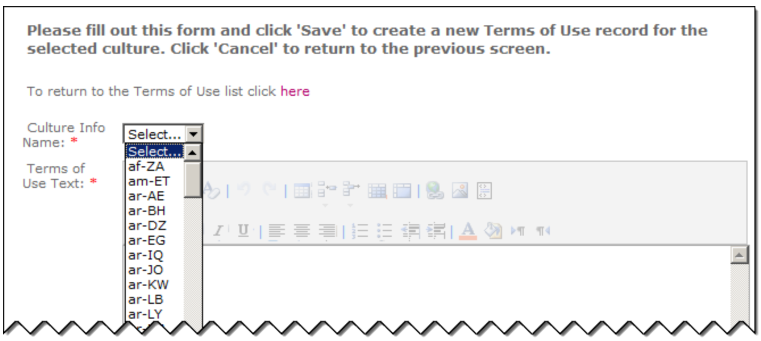
To create a new Terms of Use record click

| | Culture | Version | Version Date: |
|---|---|---|---|
| Edit | de-DE | 1 | 9/30/2011 10:18:21 AM |
| Edit | en-US | 1 | 9/30/2011 10:18:21 AM |
| Edit | es-ES | 1 | 9/30/2011 4:47:30 PM |
| Edit | fr-FR | 1 | 9/30/2011 10:18:21 AM |
| Edit | it-IT | 1 | 9/30/2011 10:18:21 AM |
| Edit | ja-JP | 1 | 9/30/2011 10:18:21 AM |
| Edit | ko-KR | 1 | 9/30/2011 10:18:21 AM |
| Edit | ru-RU | 1 | 9/30/2011 10:18:21 AM |
| Edit | zh-CN | 1 | 9/30/2011 10:18:21 AM |
| Edit | zh-TW | 1 | 9/30/2011 10:18:21 AM |

Cancel

*Screenshot 129: Page for entering new terms of use*

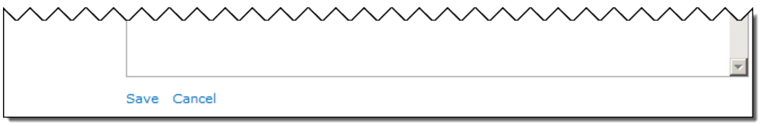
4. Select the culture code of the language in which you'll be creating a terms of use in the **Culture Info Name** dropdown.




*Screenshot 130: Select the culture code*

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.




*Screenshot 131: Click Save*

## 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 can 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.

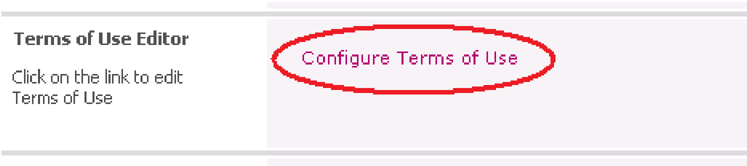
4. The user herself must then go to the site, and from her personal menu must open **Select Display Language** and then choose her preferred language. The terms and conditions is then displayed to the user in the user's chosen language.

### 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.

**Below are the steps to activate the terms of use feature:**

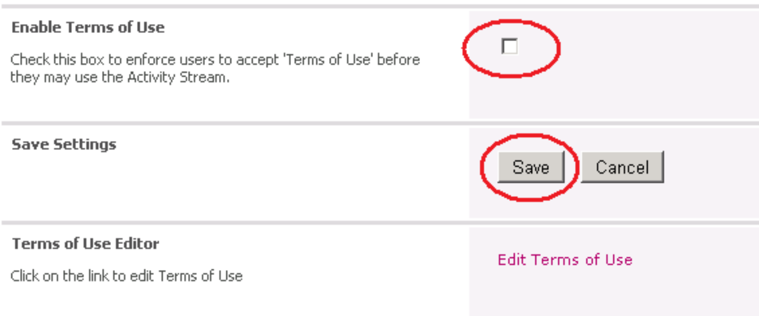
1. From the **Social Platform Management** page, click **Configure Terms of Use**. The **Terms of Use configuration** page appears.




*Screenshot 132: Click* ***Configure Terms of Use***

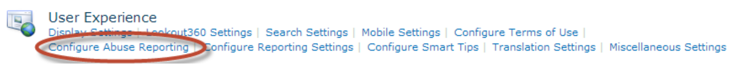
2. Check the box in the **Enable Terms of Use section**.

3. Click **Save** in the **Save Settings** section.




*Screenshot 133: Click Save*

## Abuse Reporting Configuration page




*Screenshot 134: Configure Abuse Reporting*

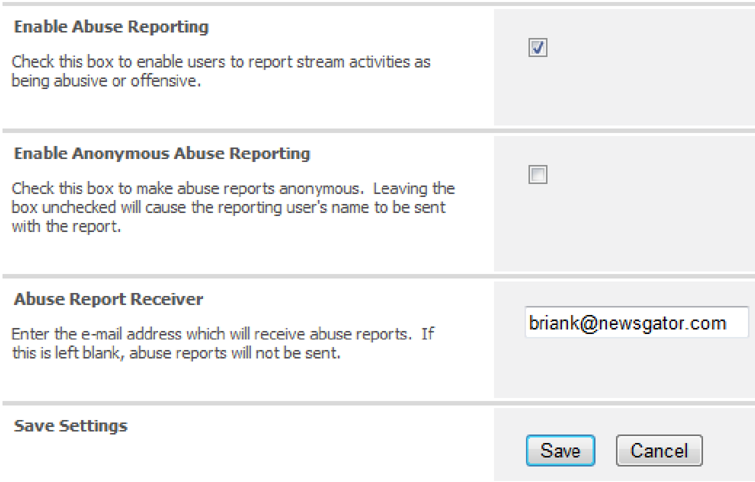
Abuse reporting is an optional feature that allows users to report stream activities as being abusive or offensive.

You can turn it on by following the below steps:

1. Click the **Configure Abuse Reporting** link to get to the **Abuse Reporting Configuration** page.

2. Check the **Enable Abuse Reporting** box.

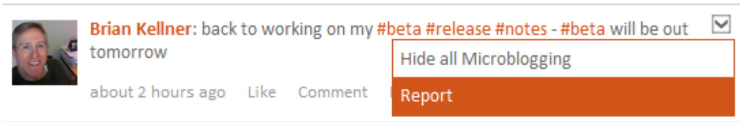
3. Click **Save**




*Screenshot 135: Abuse reporting configuration page*

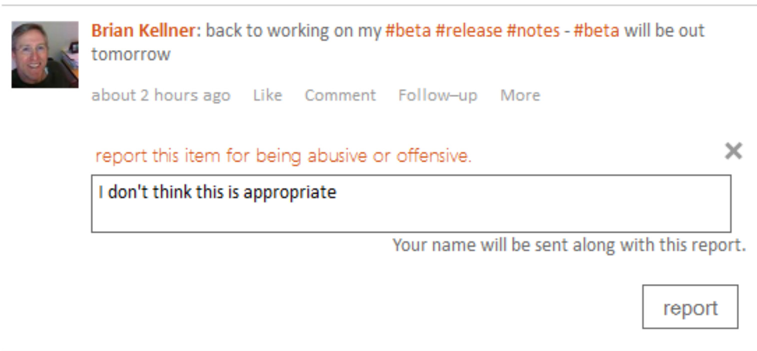
Besides choosing to turn on this capability, the other settings are whether the reporter to be anonymous or public and what email address should get the abuse report emails.

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.



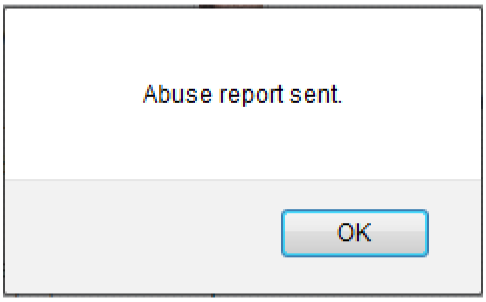

*Screenshot 136: Choose **Report** from dropdown*

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



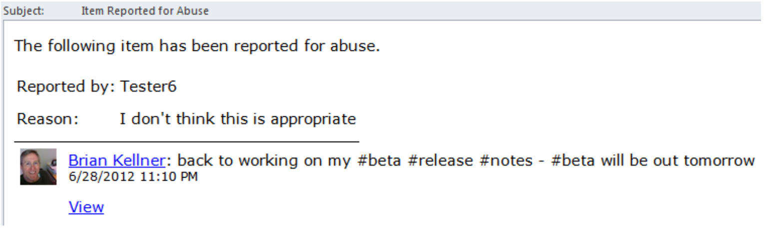

*Screenshot 137: Reporting form*

When the user submits this report, a confirmation dialog is displayed and an email is sent to the address specified in **Central Admin**.




*Screenshot 138: Confirmation message*

The notification email contains a link to the View page so that the item can be deleted (hidden from display) if necessary.



Subject: Item Reported for Abuse

The following item has been reported for abuse.

Reported by: Tester6

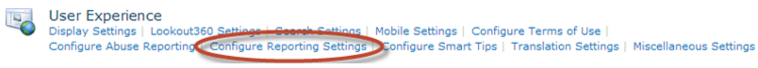
Reason: I don't think this is appropriate

Brian Kellner: back to working on my #beta #release #notes - #beta will be out tomorrow
6/28/2012 11:10 PM

View

*Screenshot 139: Notification email*

## Reporting Configuration page



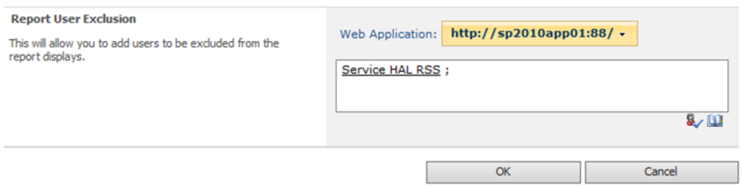

*Screenshot 140: Click **Configure Reporting Settings***

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

Any service accounts used as authors of activity stream items appears 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.

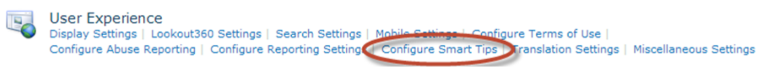
In the **Report User Exclusion** section, enter any such accounts. If you have deployed the optional News Stream module, you should include the **News Activity Author** account as specified in the News Stream Options screen of the Aurea Social installer (see Aurea Social Install Guide for details), and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

For further details, see the Administration section in the News Stream module.



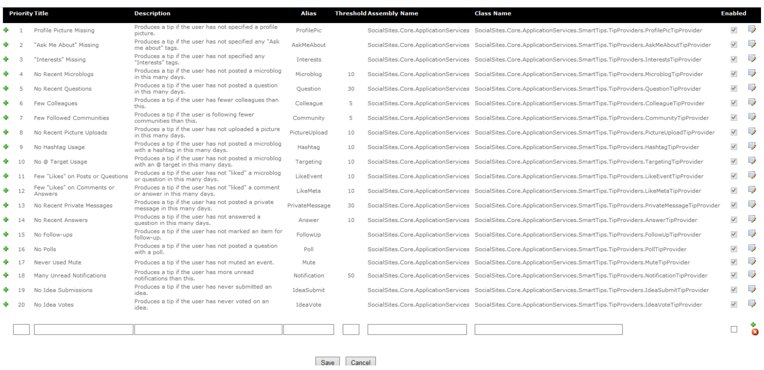

*Screenshot 141: **Report User Exclusion** section*

## Configure Smart Tips page




*Screenshot 142: Click **Configure Smart Tips***

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

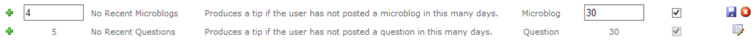


| Priority | Title | Description | Alias | Threshold | Assembly Name | Class Name | Enabled |
|---|---|---|---|---|---|---|---|
| 1 | Profile Picture Missing | Produces a tip if the user has not specified a profile picture. | ProfilePic | | SocialSites.Core.ApplicationServices | SocialSites.Core.ApplicationServices.SmartTips.TipProviders.ProfilePicTipProvider | ☑ |
| 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

*Screenshot 143: Configure Smart Tips page*

Aurea 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. Click the edit icon in the right column to access these controls.



*Screenshot 144: Click the edit icon to access the controls*

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 screenshot above, "profile picture missing" is the highest priority tip. So the job first looks at each user to see if they should get this tip. A user should get this tip if he does not have a profile picture uploaded and 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, Aurea Social looks 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.

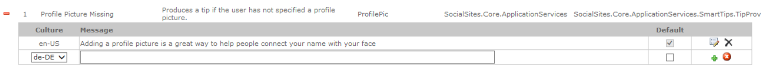
The threshold value applies for some types of tips. The description text tells how the threshold value is used.

In the example, the tip is only sent if the user has not added a microblog for 30 days. Disabling a tip means that it is never sent. Clicking the disk icon saves changes – the red circle with the **X** cancels changes.

**Important:**

You must click **Save** at the bottom of the page to save all your final changes when you are done.

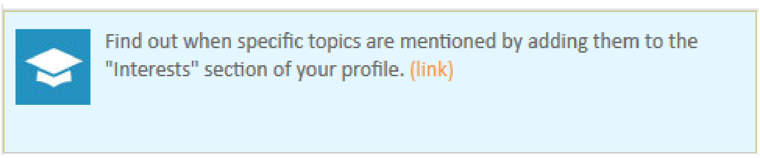
The plus icon on the left side of the page allows editing the message for a specific tip.



*Screenshot 145: Click the green plus icon to add more messages.*

You can change or add to the default text in English or add text for any of the other supported languages for Aurea 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).



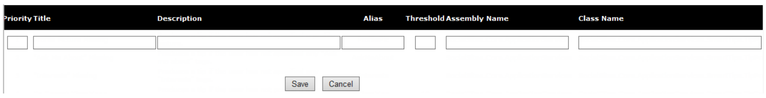

*Screenshot 146: Link added to a tip*

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:**
> You must click **Save** at the bottom of the page to save all your final changes when you are done.

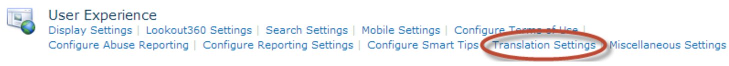
Customers can add their own tip providers to check for additional conditions. The UI for adding a provider requires filling in several fields.




*Screenshot 147: Add the tip providers*

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)




*Screenshot 148: Click **Translation Settings***

While the user interface of Aurea Social is translated into many languages, the content in the activity stream is in a single language.

Aurea 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.

As some translation services cost money, 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.

> **Note:**
> For SharePoint 2010, this is no longer available as of 2017-03-31 due to Azure DataMarket and Data Services being retired by Microsoft.

> **Note:**
> For SharePoint 2013 / 2016, administrators need to provision the SharePoint Machine Translation Service Application.

When translation is enabled, activity stream items has a translate menu with all available languages. This translates the individual item when a user selects the language as shown in the screenshot below.


*Screenshot 149: Select desired language*

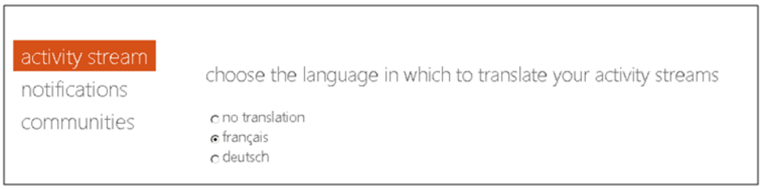
## Enabling Translations

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

On this page, you can select languages to "automatically" translate content into. When one or more languages are selected, a **NewsGator Translation** timer job is created that runs every 15 minutes by default.

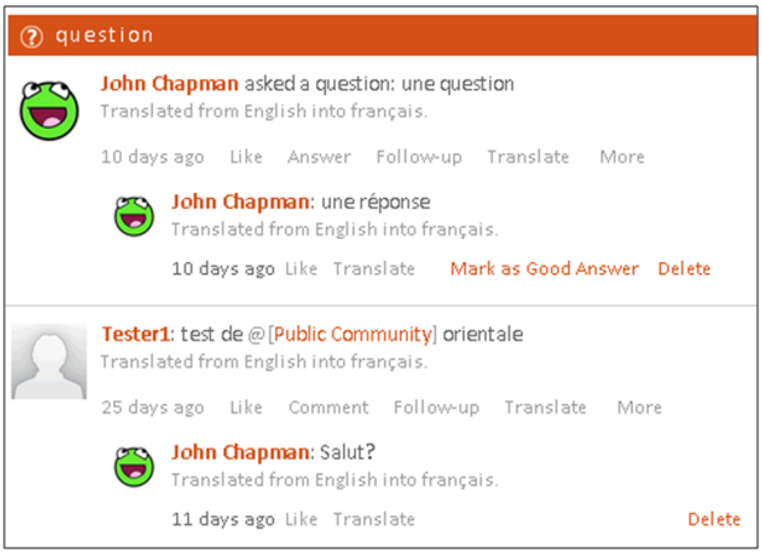
This takes all the items from the last 14 days that have not been translated and translates them – storing the translated versions.

When one or more languages are selected for automatic translation, the user can select them from their activity stream settings.




*Screenshot 150: Activity stream settings*

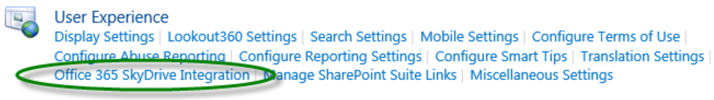
When a language is selected here, the user's stream still use the language of the site for the UI elements. However, items that have been translated displays their text in the translated language:




*Screenshot 151: Translated items*

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

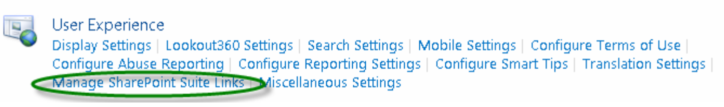
## Office 365 Bridge (SharePoint 2013 only)




*Screenshot 152: Click Office 365 SkyDrive Integration*

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

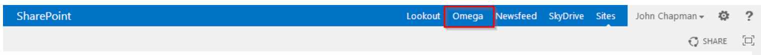
## Manage Suite Bar Links (SharePoint 2013 only)



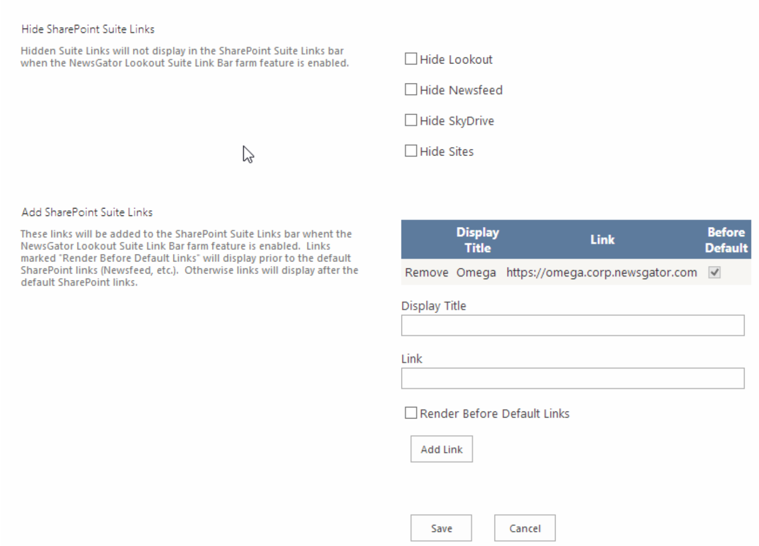

*Screenshot 153: Click* ***Manage SharePoint Suite Links***

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.

Manage Suite bar allows you to add custom menu items on the Sharepoint header.



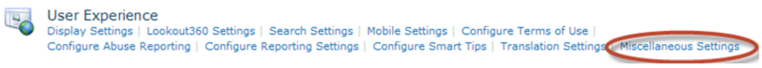

*Screenshot 154: Custom menu item added*




*Screenshot 155: Manage Suit bar settings*

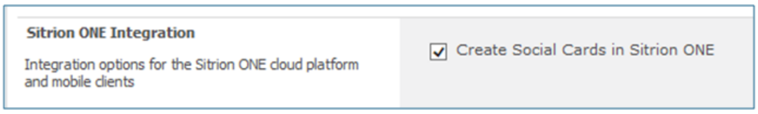
> **Note:**
>
> Some customers wanted the ability to use the custom Skyvera SharePoint Suite Links in every farm controlled from a single farm. To support this, the SuiteLinks configuration has been moved to the `FarmConfiguration` table.
>
> This allows the parent farm to set the links, and then a consuming 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




*Screenshot 156: Click **Miscellaneous Settings***

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




*Screenshot 157: Enable the checkbox to send data to Skyvera ONE cloud service about new activity in the stream*

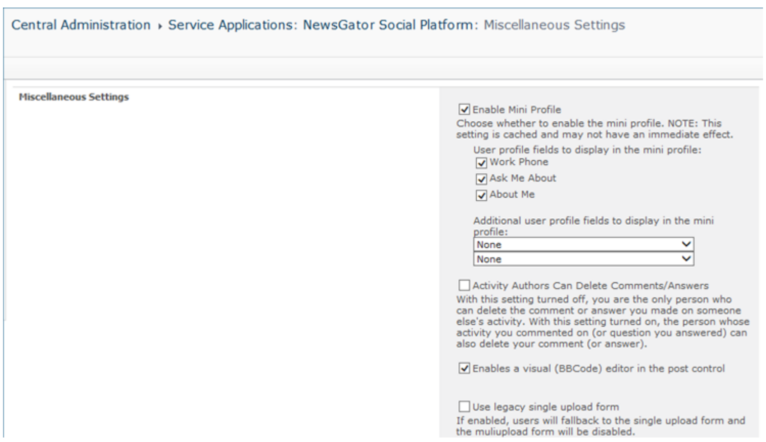
Checking this box causes Aurea Social to send data to the Skyvera ONE cloud service to create cards for users whenever new microblogs or questions are added to the stream. Users with the Skyvera ONE client will see these cards whenever they log in with the ONE client.

Checking this box also causes the Aurea Social server software to update these cards as comments or answers are added. The card stored in the Skyvera 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 Skyvera 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:**
> This ties into the notification channels setting in that, if a user has disabled a particular notification for sending mobile push messages, neither the Aurea Social mobile client nor the Skyvera ONE mobile client will get a push notification for that case.

Click **Miscellaneous Settings** to get to a page with several different Aurea Social behavior options (screenshot only shows top portion of page):




*Screenshot 158: Miscellaneous Settings window*

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.

Below are the settings that can be performed:

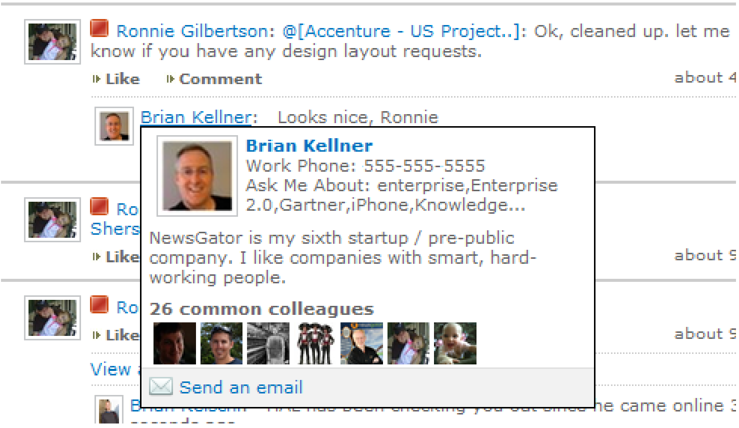
## Enable and configure mini profile

### 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 appears 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.

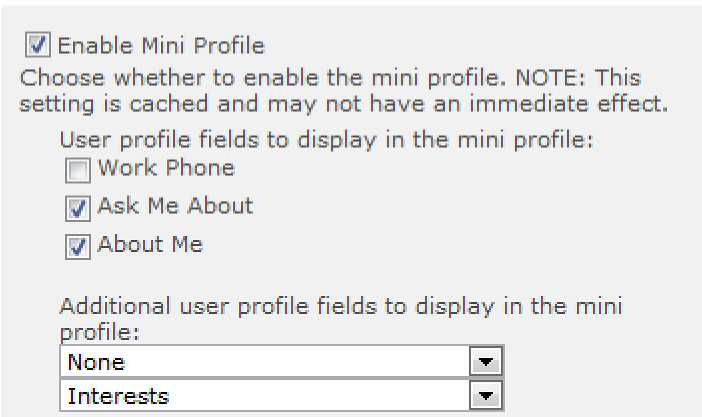
This window is referred to as that user's "mini profile". From here you can send that user an email, open the full profile of this user, or open the full profile of any of the common colleagues pictured.




*Screenshot 159: Mini profile enabled*

### Configure the Mini Profile

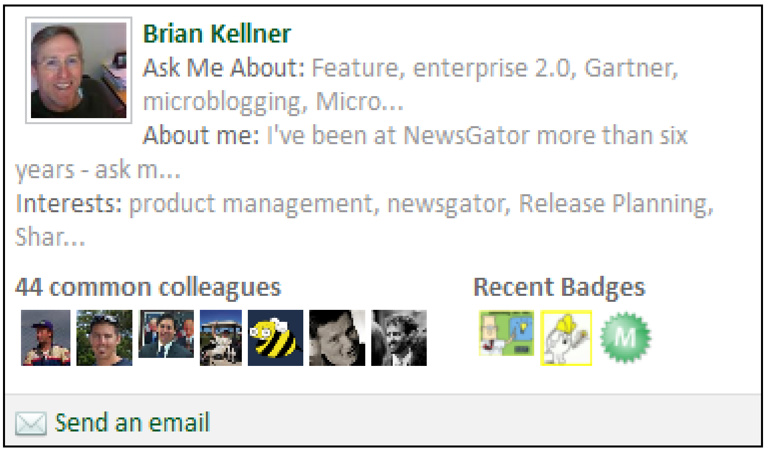
Administrators can choose to not include any of the three default fields (work phone, ask me about, and about me) as well as add up to two fields from the user profile to include in the display on the mini-profile card.




*Screenshot 160: Choose the fields to be displayed on mini profile*

When the card is viewed, the additional fields are displayed at the bottom.

> **Note:**
> 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 is displayed.
> This also means that html cannot be displayed in the card even if users have added it to the selected fields.




*Screenshot 161: Mini profile card*

## Activity Authors Can Delete Comments

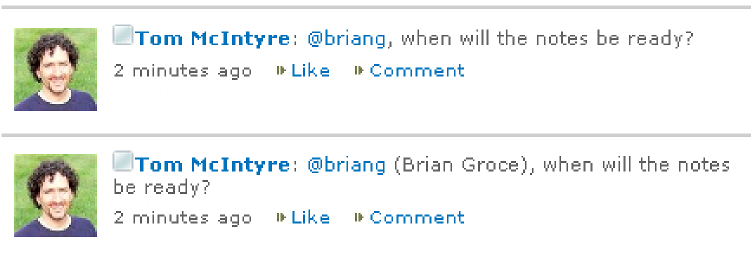
With **Activity Authors Can Delete Comments** turned off, the only user who may delete a comment made on an activity feed item is the person who made the comment. The author of the event being commented on cannot delete the comments that have been made on that event.

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).




*Screenshot 162: Append User Full Name After @target sample*

## 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 (for example, events coming from private communities or private messages). This screenshot provides an example of the normal view of a private message:

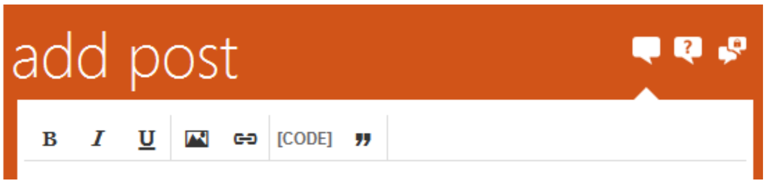

*Screenshot 163: Share option missing*

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


*Screenshot 164: Share option available*

## Enable visual editor in post control

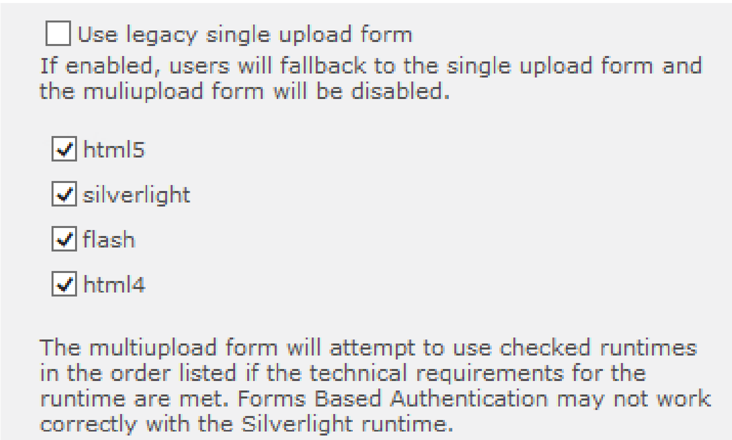
This setting determines whether users see controls for formatting in the posting box.




*Screenshot 165: Add post*

## Post upload control options

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




*Screenshot 166: Post upload control options*

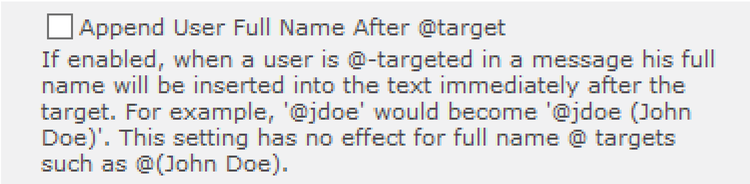
The "use legacy single upload form" option switches off multi-file upload completely and reverts to the single file upload control.

The other options allow administrators to disable specific parts of the multi-file upload control that may cause issues. The multi-file upload control attempts to use all of these technologies, but may get stuck on one that should work but fails for some reason in the environment (for example, Silverlight).

By disabling this option, the control switches 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 (for example, @ad234vt7 )




*Screenshot 167: Enable the checkbox to enable this setting*

## 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 Aurea 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, Aurea Social can target by using @(Preferred Name). If this pattern is entered, Aurea Social looks to see if it matches only one user in the system. If there are multiple matches, it only sends a notification to a targeted user if the sender of the message has only one colleague who matches.

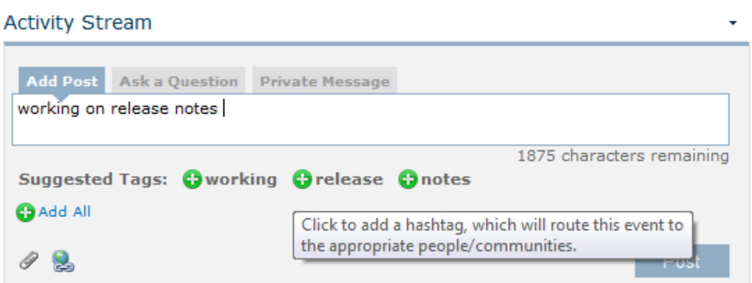

*Screenshot 168: Use Full Name for @Targeting*

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

## Enable hashtag suggestions

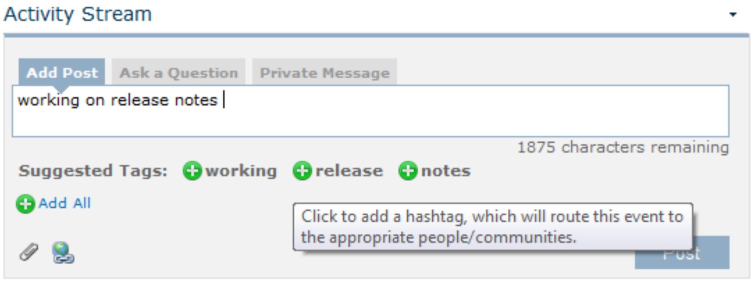
With **Enable hashtag suggestions** turned off, users are left to their own devices to decide when a word they type makes a suitable hashtag by which to index the post so that others may more easily locate it. In fact, not all users know that they can type the # sign and get suggestions on hashtags,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

With **Enable hashtag suggestions** turned on, Aurea Social provides 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:




*Screenshot 169: Activity Stream window*

Hovering mouse over the suggestions gives a tool tip to tell the user what clicking on the "+" symbol does. When the user clicks, the hashtag is added in the post.




*Screenshot 170: Click on **Add all***

Clicking on **Add all** adds all the suggested hashtags. To limit potential performance impacts, only single-term hashtags is 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 expires after the web page has been loaded for at least 30 minutes without refreshing.
> Refreshing the web page resets the auto complete 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.

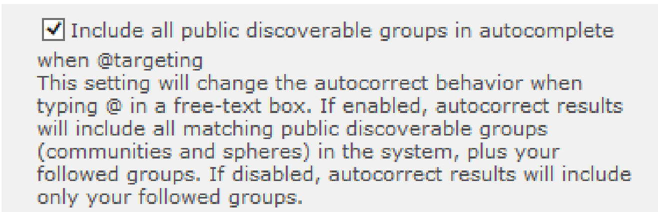
With **Include all users in autocomplete when @targeting** turned on, when a user types @ and part of a name, they'll get a list of potential matching people from among all SharePoint users, including people who are not the user's colleague.

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


*Screenshot 171: Type '@' and a few letters of the name to get matching people*

## 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.




*Screenshot 172: Type '@' and part of a name to get the list of matching people*

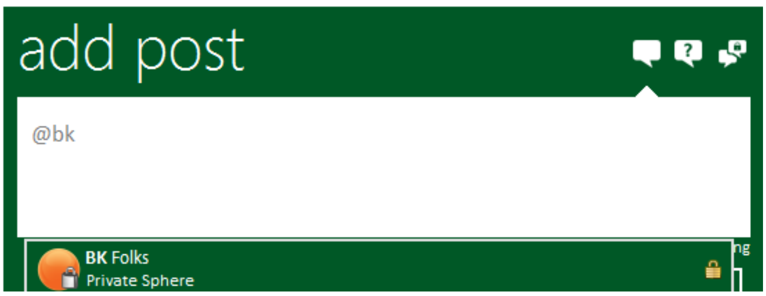
When this checkbox is selected, all public discoverable groups autocompletes in addition to the groups the user is following. This functional only works if the feature to autocomplete all users is also selected.

## 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. Aurea Social cautions the user against doing so, but it does not prevent them from doing it.

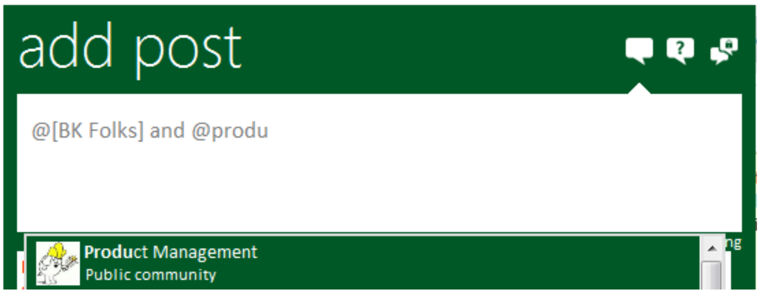
With **Enforce preservation of activity event privacy** turned on, activity items retains its security scope. A user is unable to show a message from a private community to a wider audience by sharing it with, or @-targeting it to, another person, sphere, or community.

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



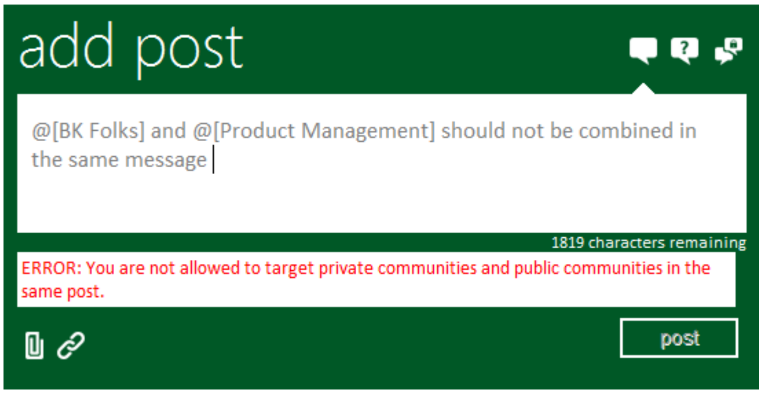

*Screenshot 173: A private sphere is added to a post*

Then a public community is added to the same post.



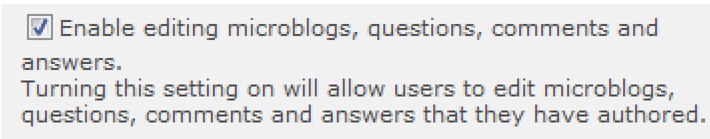

*Screenshot 174: A public community is added to the same post*

The user is told that this is not allowed and the post is blocked from being added to the stream.




*Screenshot 175: The post is blocked from being added to the stream*

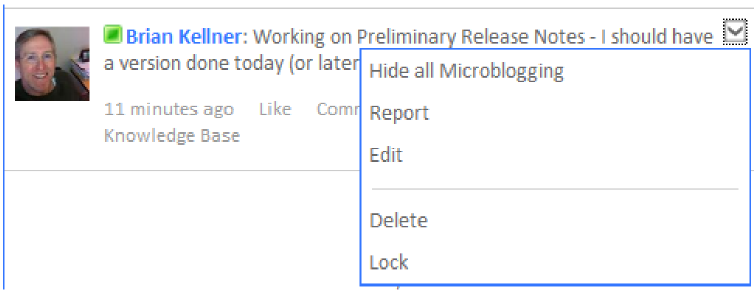
## Enable editing microblogs, questions, comments and answers




*Screenshot 176: Enable editing microblogs, questions, comments and answers*

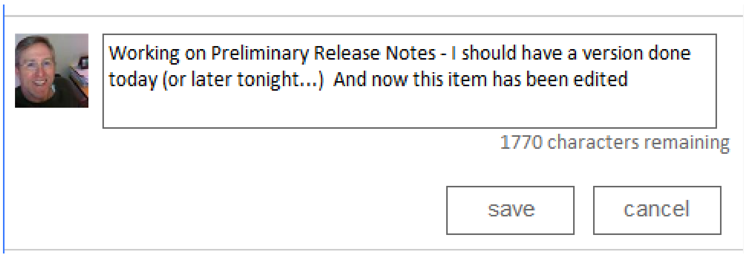
With **Enable editing microblogs, questions, comments and answers** turned off, there is no Edit option on any user-created **Activity Stream** content.

With **Enable editing microblogs, questions, comments and answers** turned on, users 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.




*Screenshot 177: Click **Edit***

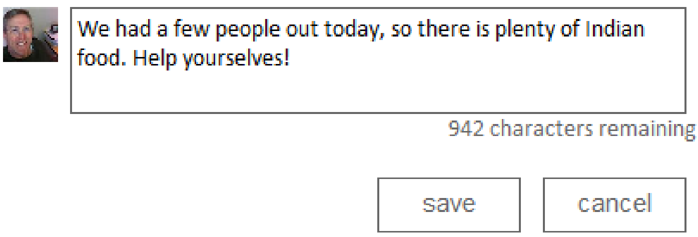
For compliance reasons, Aurea Social keeps a copy of the original item as it was created. So clicking **Edit** actually marks the original item as deleted in the database and creates a new item with the same starting text already populated.



*Screenshot 178: New item with same starting text populated*

Editing a comment or answer works the same way.

*Screenshot 179: Editing a comment or replying a comment*

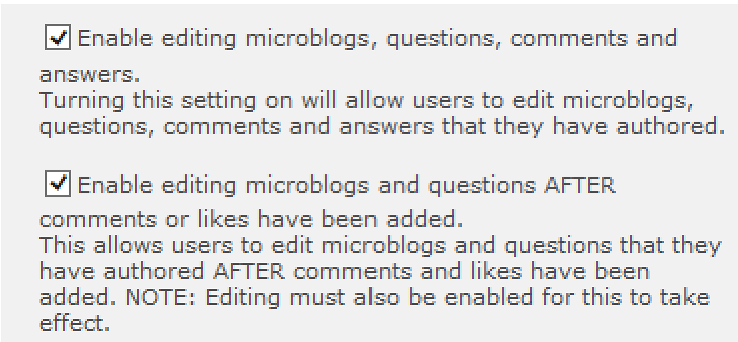


*Screenshot 180: Editing a comment or replying a comment*

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

Before version 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.

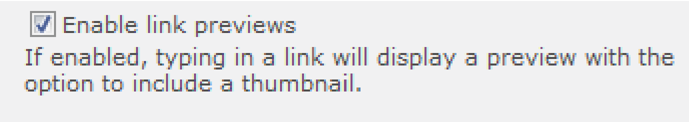


*Screenshot 181: Check checkboxes to enable*

**Note:**

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



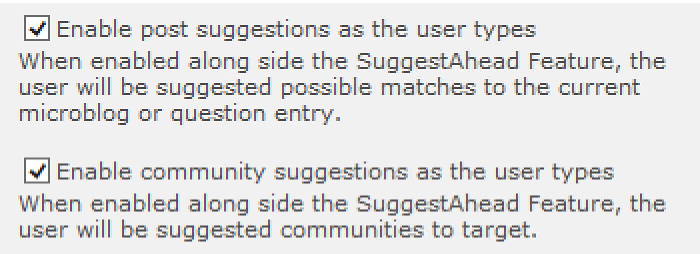

*Screenshot 182: Check checkbox to enable*

With **Enable link previews** turned on, when a user includes an URL while creating a microblog, Aurea Social automatically looks for an image and summary to include in the resulting post. If found, the image and summary is displayed to the author of the post while they are still constructing it. The author has 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 causes 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

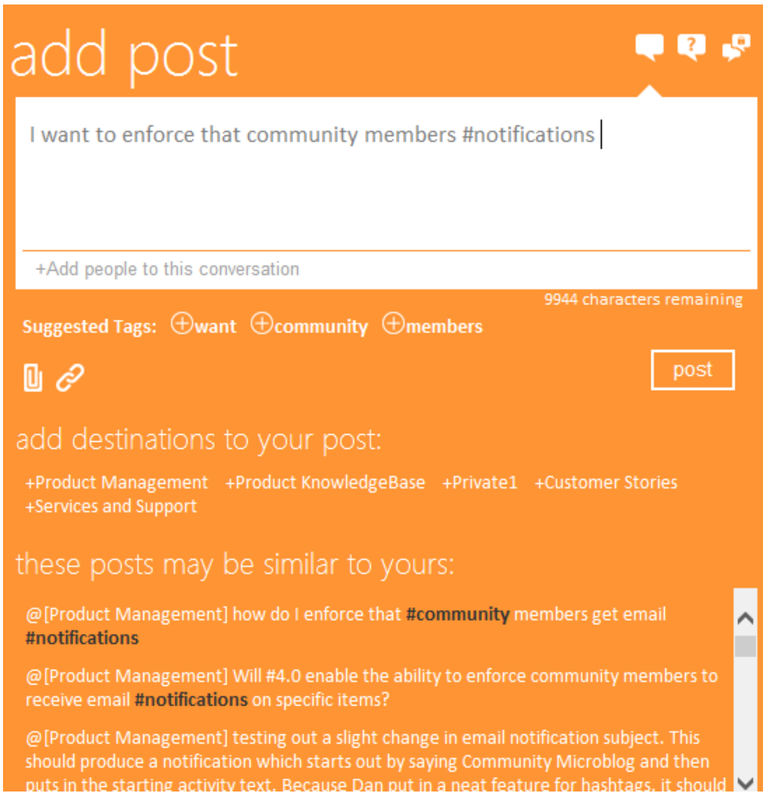
The next two checkboxes only apply if you have configured an App Fabric Cache server (see Manage Cache Settings) and if you are running the Suggest Ahead job.




*Screenshot 183: Check checkboxes to enable*

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.




*Screenshot 184: Matching microblogs or questions are displayed as you type your own*

Clicking on a community adds it to the “add people to this conversation” section as a target for the post. Clicking on a post opens it in a dialog box so the user can view the post and all comments.

> **Note:**
> 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 see suggestions on their posts.
> If your Aurea 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.

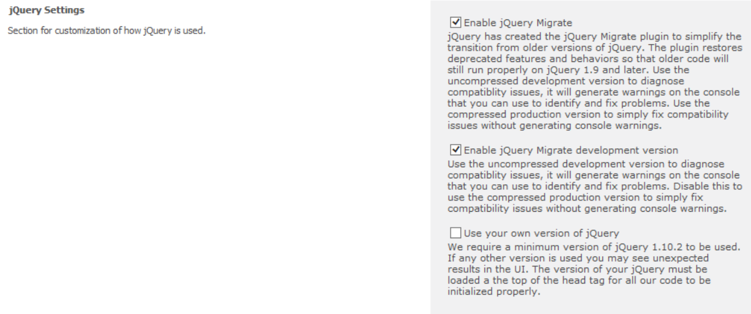
## Community Recognition

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


*Screenshot 185: Check checkbox to enable*

## jQuery Settings

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



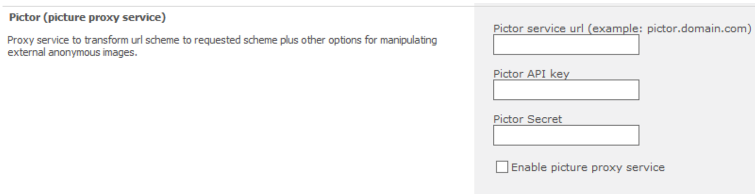

*Screenshot 186: Check checkbox to enable*

## 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.

Aurea Social 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.

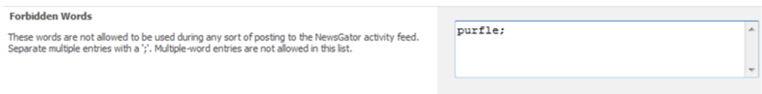
Contact Aurea Social if you want to install this proxy. The installation instructions includes information on setting these values.




*Screenshot 187: Use these settings if you are setting up a proxy service for images*

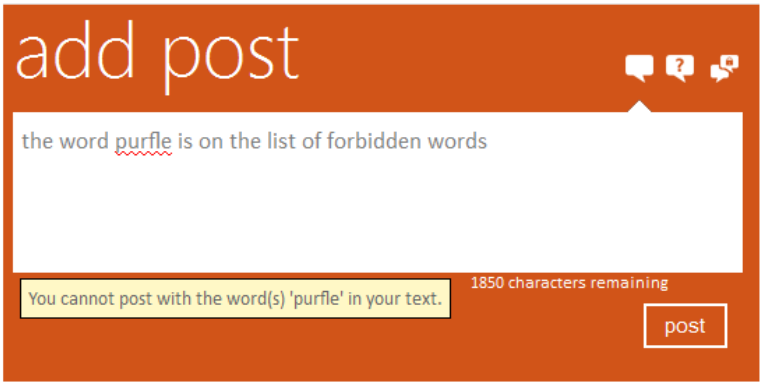
## Forbidden words

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




*Screenshot 188: Forbidden words*

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.




*Screenshot 189: Forbidden words are blocked*

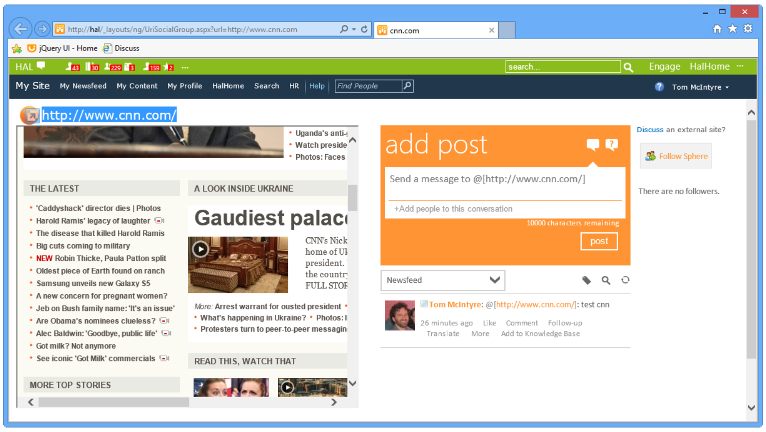
> **Note:**
> Only single-word terms are supported in this feature.

## Item-Level discussions

In Aurea 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:




*Screenshot 190: Discussion sphere on the right and an iframe containing web page on the left*

## 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, Aurea 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** matchs `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.


*Screenshot 191: Generating redirect urls*

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

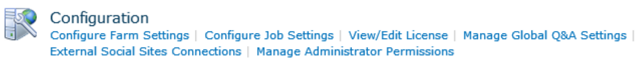
```
http://hal/_lay-
outs/ng/UriSocialGroup.aspx?url=http://www.cnn.com?Custom=true
```

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 Aurea 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.

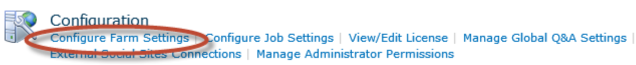
## 1.35.3 Configuration section




*Screenshot 192: Configuration section*

Below are the settings under configuration section:

### Configuring Farm Settings

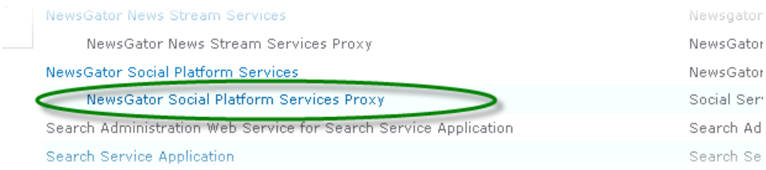



*Screenshot 193: Configuration Farm Settings*

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.

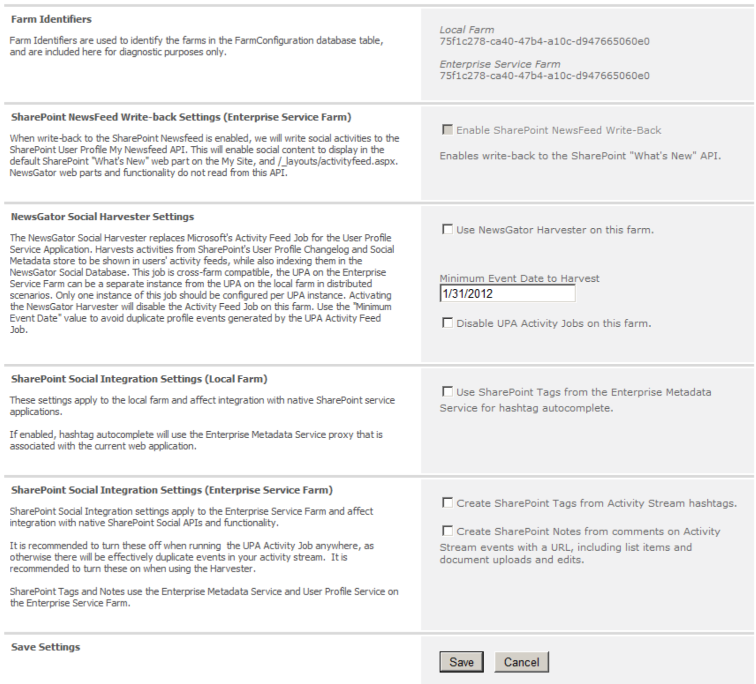
The settings on the screen that displays apply to the local farm, and can be configured independently in a multi-farm configuration of Aurea Social.

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




*Screenshot 194: Click NewsGator Social Platform Services Proxy*

The following screen displays:




*Screenshot 195: Configure farm settings here*

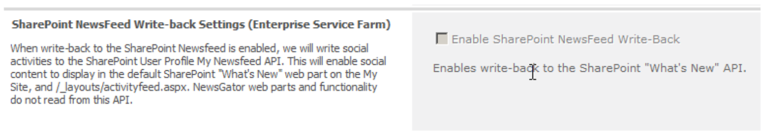
Configure settings on this page and click **Save**.

Below settings needs to be configured:

## Farm Identifiers section

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

## SharePoint NewsFeed Write-back Settings section




*Screenshot 196: SharePoint NewsFeed Write-back Settings*

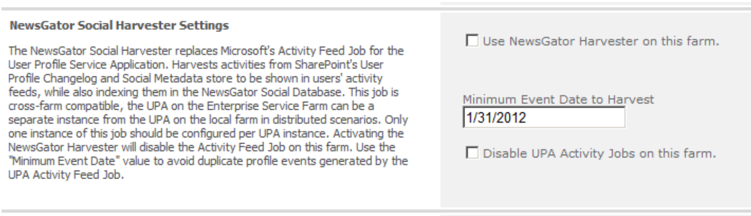
When write-back to the SharePoint Newsfeed is enabled, Aurea Social writes social activities to the SharePoint User Profile My Newsfeed API.

This enables 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 Aurea Social, and you have some users who don't see any Aurea Social functionality.

Otherwise, using write-back is not recommended. NewsGator web parts and functionality do not read from this API, and is therefore unaffected by turning on this setting.

## NewsGator Social Harvester Settings section




*Screenshot 197: NewsGator Social Harvester Settings*

> **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 is able to access this page, however the UPA Activity Job does 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 Aurea 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, do the following:

1. Check **Use NewsGator Harvester** on this farm.
2. Click **Save**.

> **Note:**
> New installations has this enabled by default. It only needs to be activated for upgrades.

When this is done, **Disable UPA Activity Jobs** on this farm is 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.

If 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 is a chance that the UPSA Activity Feed Job becomes 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 puts 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 Aurea 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 Aurea 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, Aurea Social with the Harvester running can now ensure consistent treatment of all these items. Additionally, companies who use the Aurea 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 Aurea Social only needs the social data brought into the central farm where the Aurea Social managed service application runs, this can mean substantially less replication of data among farms.

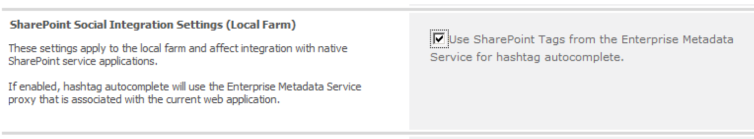
### Taking advantage of the harvester: integrating hashtags and comments into SharePoint

When running the NewsGator social harvester, you 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



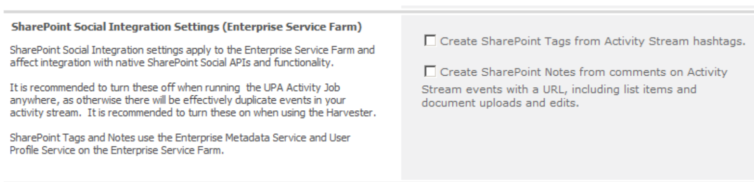

*Screenshot 198: SharePoint Social Integration Settings (Local Farm)*

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 gets the same terms recommended to them for hashtags as they get as tag recommendations when using the SharePoint tagging UI.

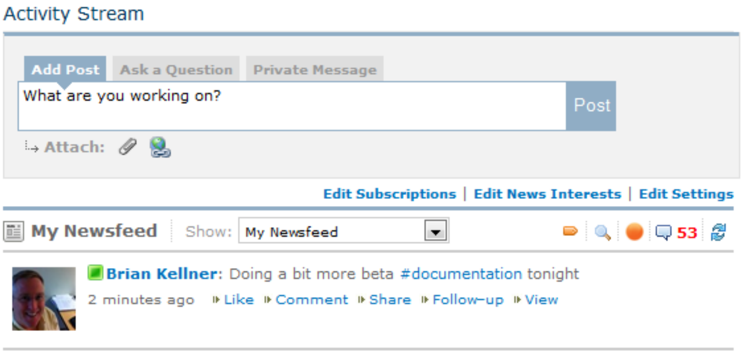
### SharePoint Social Integration Settings section




*Screenshot 199: SharePoint Social Integration Settings (Enterprise Service Farm)*

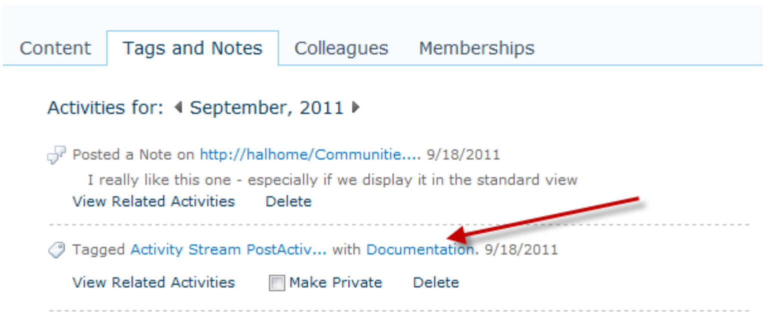
The **Create SharePoint Tags** from **Activity Stream** hashtags setting causes any hashtags used in activity stream posts to be copied SharePoint as tags on the activity stream event.

For example, in the microblog message below, the hashtag #Documentation is used.




*Screenshot 200: Hashtag #Documentation is used in this microblog*

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



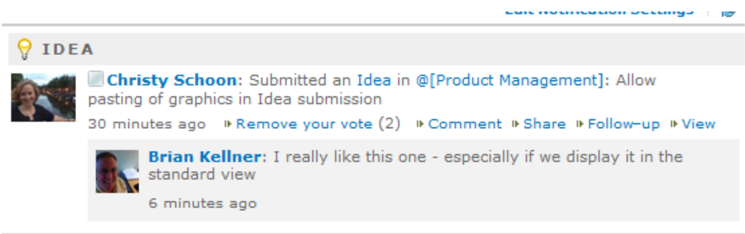

*Screenshot 201: Tags and Notes tab*

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 automatically integrates Aurea 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

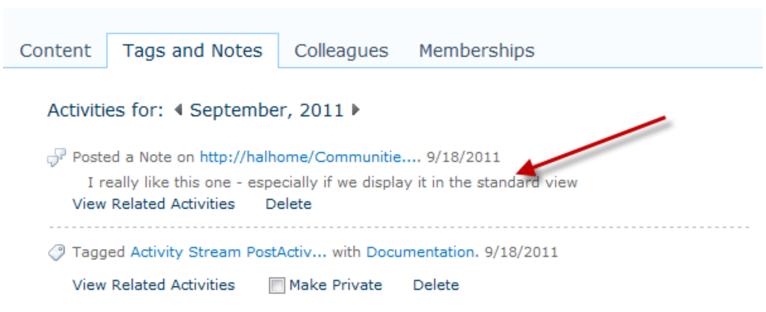
The **Create SharePoint Notes from comments on Activity Stream** events with a URL setting causes comments made on activity stream events to be copied as notes on any associated list item, whose URL is included in the activity stream event.

In the example below, a comment is added to the upload event for a new document.



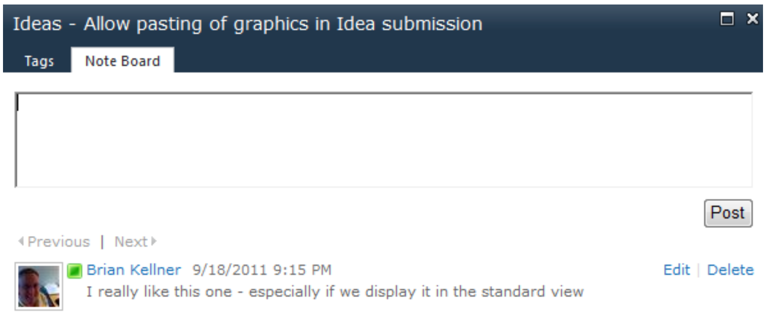

*Screenshot 202: A comment is added to the upload event for a new document*

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




*Screenshot 203: Tags and Notes*

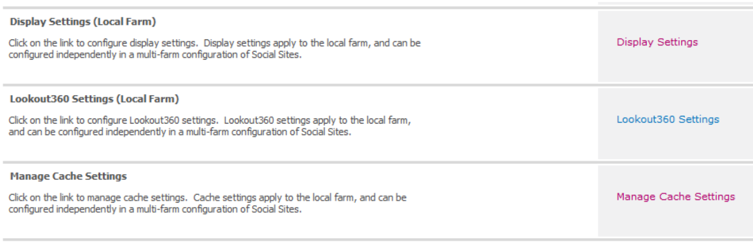
It also shows in the Notes portion when viewing the Notes control for the specific list item.




*Screenshot 204: Note Board*

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.

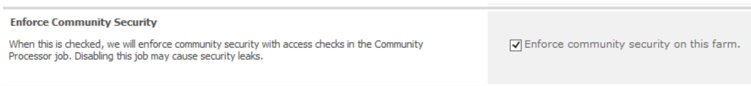



*Screenshot 205: Shortcuts to several admin pages for the local farm*

## Enforce Community Security

In some environments, when the Aurea 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 results in incorrectly removing users from private communities.




*Screenshot 206: Enforce Community Security*

## Webtrends Integration

> **Note:**
> As of the 5.2 release, this integration is no longer officially supported.

## Shared Storage for Non-community File Uploads

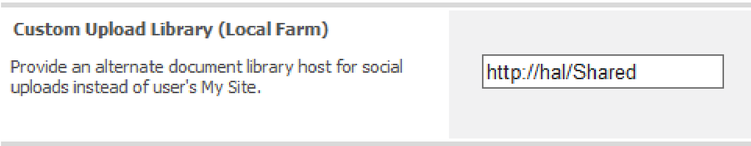
> **Note:**
> This feature is available starting in the 5.2 release.

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**.




*Screenshot 207: Custom Upload Library (Local Farms)*

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


*Screenshot 208: Job Configuration page*

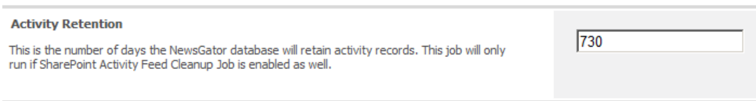
Click **Configure Job Settings** to go to the **Job Configuration** page. Use this page to adjust how much data Aurea Social jobs are to process or retain.

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 Aurea 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 is kept indefinitely if the **SharePoint Activity Feed Cleanup** job is not on. When it is on, Aurea Social removes any activity data it created more than 14 days ago.

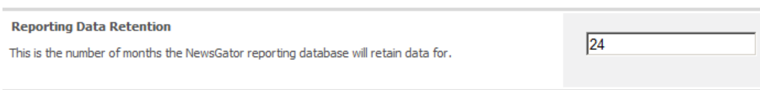
To change the number of days Aurea Social keeps this data, do the following:

1. Click **Configure Job Settings** in the Job Configuration settings section of the NewsGator Social Platform management page.

2. Edit the **Activity Retention** field to the desired number of days.

3. Click **Save**.

### Reporting Data




*Screenshot 209: Reporting Data Retention*

> **Note:**
>
> While other retention settings are in days, 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 does 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 Aurea Social keeps reporting data, do the following:

1. Click **Configure Job Settings** in the Job Configuration settings section of the **NewsGator Social Platform** management page.

2. Edit the **Reporting Data Retention** field to the desired number of months.

3. Click **Save**.

## Activity notifications


*Screenshot 210: Notification Retention*

Apart from alerting emails, each SharePoint user has a list of activity notifications accessible from within their Activity Stream web part. By default, Aurea Social removes any such activity notifications that are more than 4 days old.

To change the number of days Aurea Social keeps activity notifications, do the following:

1. Click **Configure Job Settings** in the **Job Configuration** settings section of the **NewsGator Social Platform** management page.

2. Edit the **Notification Retention** field to the desired number of days.

3. Click **Save**.

> **Note:**
> The Notification Retention setting should never be greater than the Activity Retention setting. Doing so leads to notifications that link to activity events that are no longer in the system.

## Percentage of user profiles to process


*Screenshot 211: Percentage of user profiles to process during digest job*

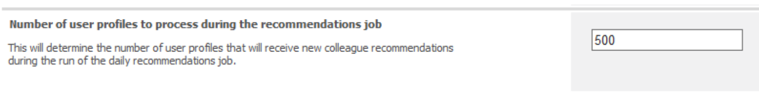
Among the Aurea Social timer jobs is a job called **NewsGator Digest Job** that sends daily email digests to users. Each user receives a digest email customized for them, summarizing the last 24 hours' microblogging activity and tracked events across all that user's colleagues and communities.

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 completes sending digests to all users in 20 hours, and likely has 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.

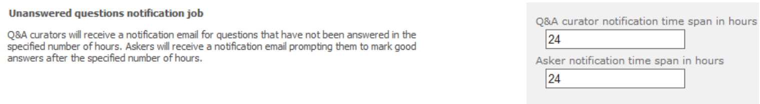
## Colleague recommendation control




*Screenshot 212: Number of user profile to process during the recommendation job*

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




*Screenshot 213: Unanswered question notification job*

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 waits for a question to remain unanswered before sending the notification to curators, and also how long the job waits 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.

For further details, see Answer Turnaround and Quality.

### Save Settings

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

## License Configuration page


*Screenshot 214: Click View/Edit License*

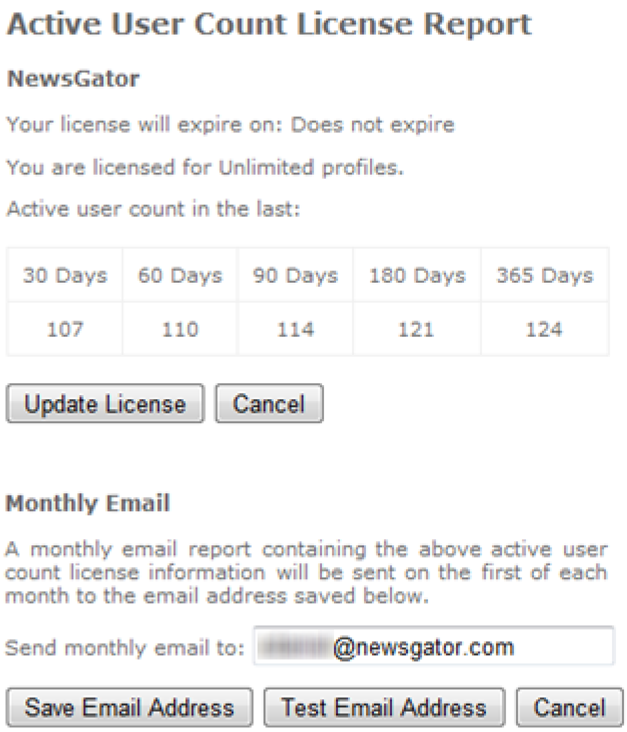
The license key provided to you by NewsGator not only allows you to install and use Aurea Social, but also determines how long you can use it, and how many users can use it.

Use the **License Configuration** section to update your Aurea Social license key, and check whether you are in compliance with your license.

Click **View/Edit License** to know when your license expires, and how many users you are licensed to have using Aurea 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 Aurea 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.




*Screenshot 215: Active User Count License Report*

A user is considered "Active" for a date range if they have viewed any of these three default filters in the **Activity Stream** web part during that time range:

- My NewsFeed
- Top News
- 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 always updates a user's active status.

Accessing any of these filters from another UI, such as using the Aurea Social Desktop application, also updates the user's active status.

If the end date of the license key is exceeded, the **Activity Stream** views throughout Aurea Social becomes disabled and displays a message to that effect, and nothing else. If you exceed the user limit of your license key, a notification is 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.

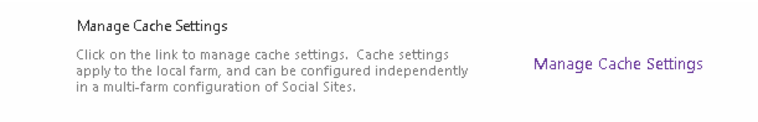
Some companies run Aurea Social on an extranet where internal employees can interact easily with people from other companies.

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 Aurea Social already, and only count external users.


*Screenshot 216: Extranet User Exclusion*

## Manage Cache Settings page

The **Manage Cache Settings** page is accessible via a link on the **Configuring Farm Settings** page.




*Screenshot 217: Manage Cache Setting*

In the 2.x releases, Aurea 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, Aurea 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.


*Screenshot 218: Cache Services Enabled*

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 GB 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 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, add them manually to the GAC, after which a reboot of the server is the easiest way to get Windows to recognize them:

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

These DLLs can be retrieved from the AppFabric Program Files folder.

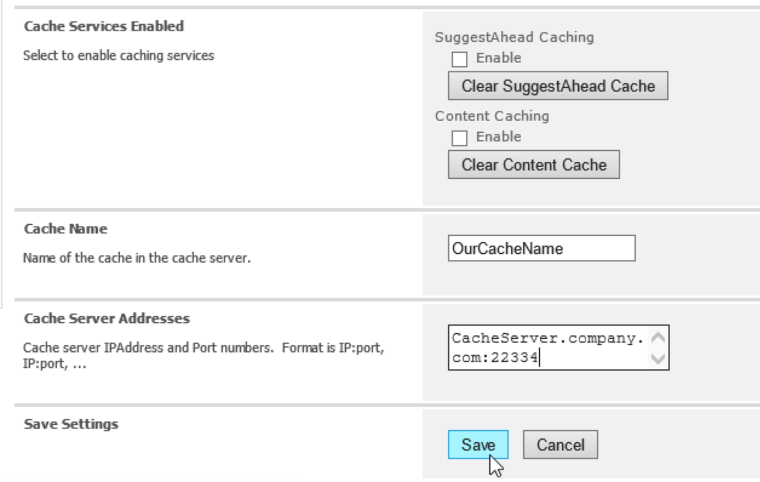
## Aurea Social Settings for AppFabric Caching

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.


*Screenshot 219: Enter information that matches your cache configuration*

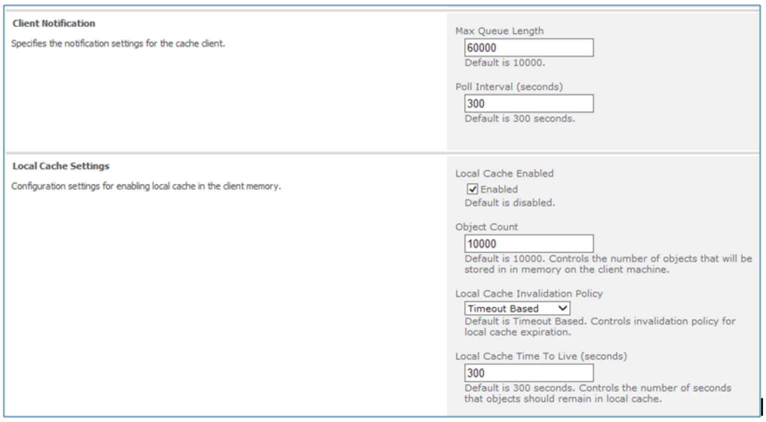
The next time the **NewsGator Suggest Ahead Builder Job** runs, the cache is filled. You can get immediate results by manually running the job. You can also update the job frequency to every 15 minutes if you desire but we do not recommend running it more frequently than that.

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 Aurea Support.



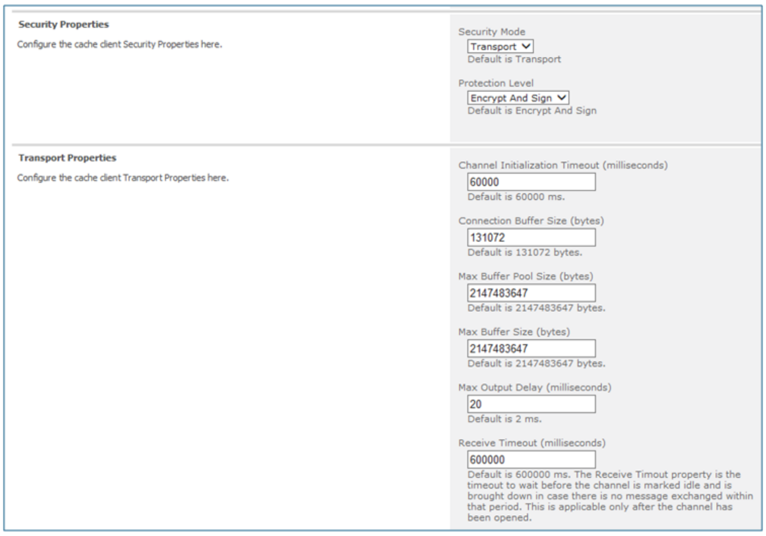

*Screenshot 220: Additional controls*

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




*Screenshot 221: These sections allow control of the client and the cache contents*

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



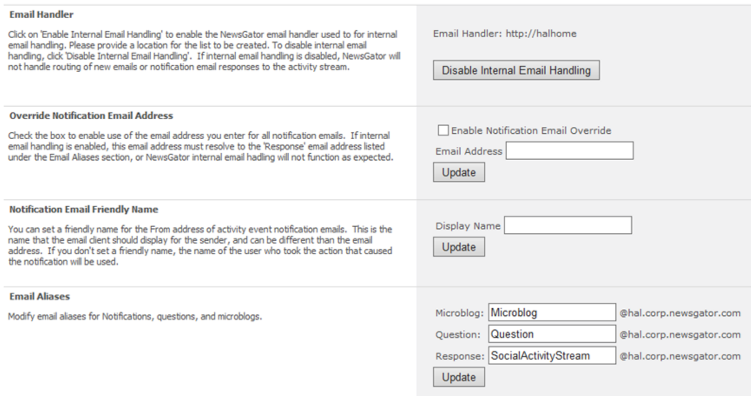

*Screenshot 222: These setting are to control security and transport communication properties*

## 1.35.4 Email and Notifications section


*Screenshot 223: Email and notification section*

### Configure Email Settings page

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




*Screenshot 224: Configure Email Settings*

#### Email Handler section

The Email Handler must be enabled for Aurea 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

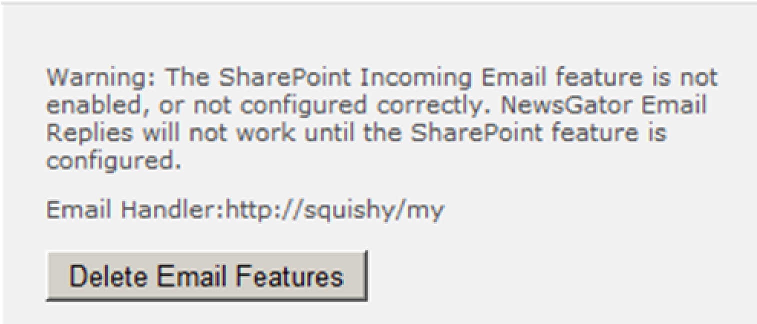
To use this last feature, see the section Global Email Addresses for microblogging and asking questions.

The Email Handler section initially requests 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 Aurea 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.




*Screenshot 225: You can opt to delete email feature*

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 now like to turn it off, you can click the **Delete Email Features** button in this section to turn alert email replying off.

### Override Notification Email Address section

Most customers do 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 have to ensure that your email system resolves that address back to the “Response” email address defined in the Email Aliases section. Otherwise, replies to notification emails do not create responses in Aurea Social.

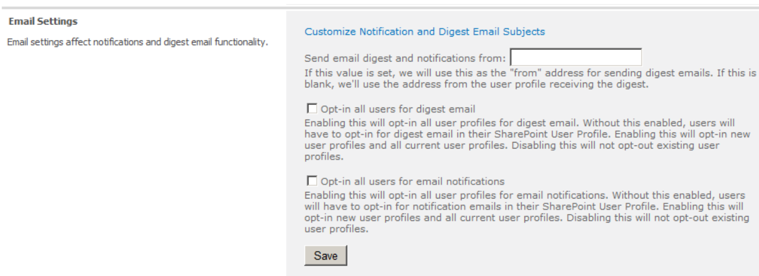
### Notification Email Friendly Name section

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 is used (this is the default).

### Email Aliases section

This section allows you to specify different aliases for emails coming into SharePoint and Aurea 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




*Screenshot 226: Email Settings*

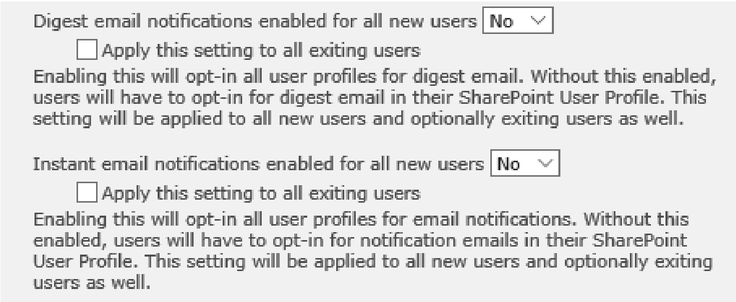
Email digests by default appears to have been sent by the user receiving the email. If this is undesired, enter a valid email address in the text box at the top of the **Email Settings** section, and future digest emails appears to have come from this address instead.

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 sets 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 are opted out and do 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.




*Screenshot 227: Set the drop down to **Yes** to turn on digest or instant email notification*

The two drop-down settings automatically turns 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 (for example, time of digest email, specific kinds of notifications).

To apply the settings to all users(including existing ones), enable the checkbox below the drop-down and click **Save**.

So, to enable digest for all users (and have it enabled by default for new users), select **Yes** from drop down and check the first checkbox and click **Save**.

Do the opposite to disable emails. If you set a pull-down to **No**, new users do not have these features switched on by default. And if you uncheck the checkbox below the dropl-down set to **No** and click **Save**, then the functionality is turned off for all users.

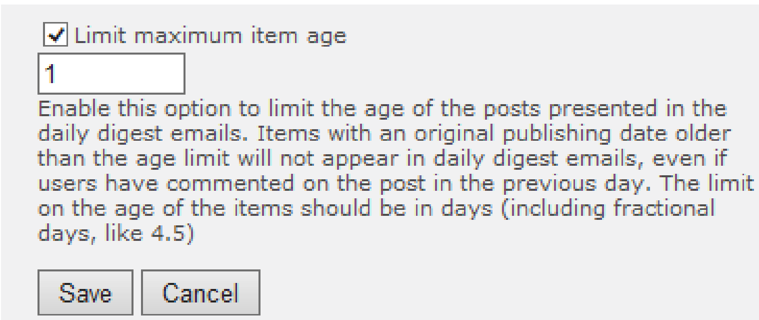
## Daily Digest Content Limiting

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.

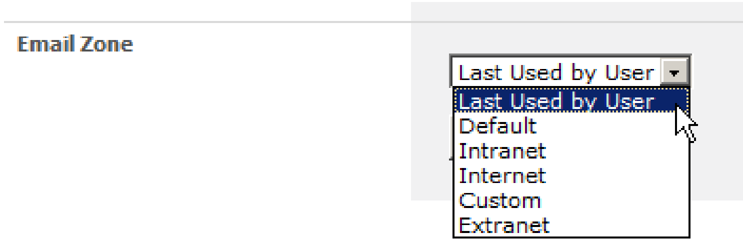
For some companies, this is a problem because some posts continue to get comments for many days which leads to large digest emails that are difficult for users to read.

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. This can be set from Email Settings.




*Screenshot 228: Content limiting*

## Email Zone section




*Screenshot 229: Email Zone*

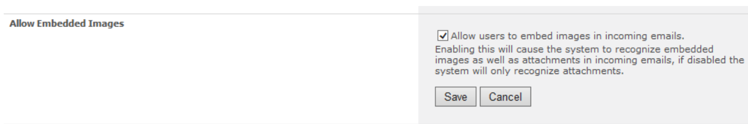
The **Email Zone** section allows you to set what **Alternate Access Mapping (AAM)** zone is used in the URLs of links that are shown digest and notification emails. If your organization does not use AAM, you can leave this on one of the first two options, **Last Used by User** or **Default**.

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 does not work for your organization, select **Last Used by User**, then click **Save**. With this option selected, Aurea Social keeps track of, for each user, the **AAM zone** they used for accessing the **Activity Stream** web part, the last time they viewed it. It uses 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 are saved into SharePoint libraries and attempts to be shown within the body of the post created from the email in the stream.




*Screenshot 230: Allow Embedded Image*

# Customize Email Contents page


*Screenshot 231: Customize Email Contents*

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

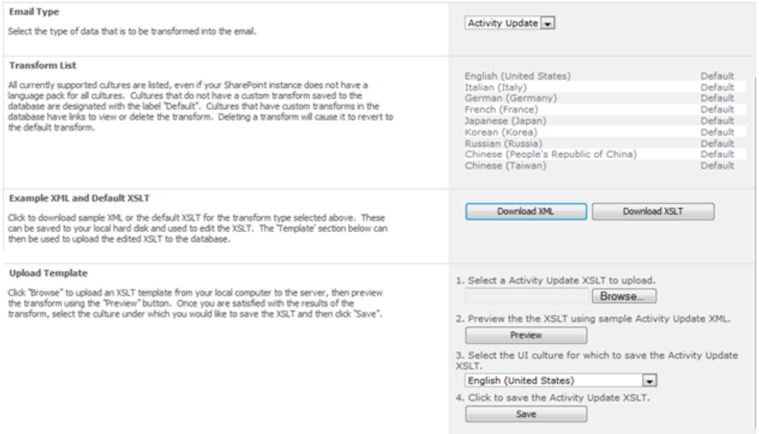
Note that once customized, upon upgrading to a future release, you will not automatically get new digest email features that NewsGator may add in that future release, because your customized XSLT will remain in use.

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) Aurea 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, click Customize Email Contents to get to the management screen pictured below:




*Screenshot 232: Management screen to customize email contents*

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)

» 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 (for example, 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. It 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.

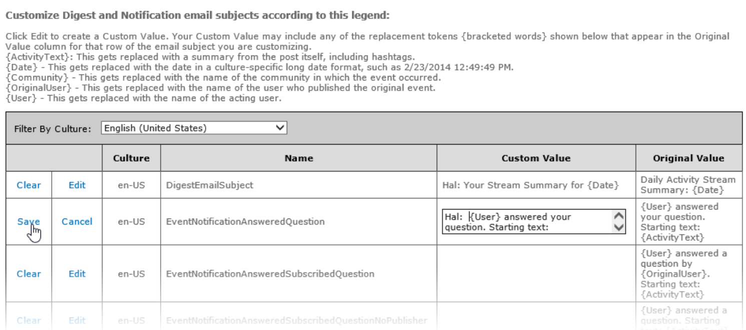
The administration for this allows specifying text for each different language. The page for controlling this is accessed by clicking Customize Notification and Digest Email Subjects in the Email and Notifications section.

## Customize Notification and Digest Email Subject


*Screenshot 233: Customize Notification and Digest Email Subject*

> **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.




*Screenshot 234: Customize Digest and Notification email subjects according to this legend*

Choosing "Edit" allows the admin to specify custom text.

In the example above, the word "Hal" is prefixed to 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.)

In the picture, 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 made the **Custom Value** field editable. And the **Original Value** field already populates the value.

The admin then types "Hal: " in front of the existing text. He can now click the **Save** link in the first column to commit these changes.

The replacement tokens allow specifying parts of the subject line that change from email to email. They are:

- {ActivityText}
- {Date}
- {Community}
- {OriginalUser}
- {User}

You may not add any replacement tokens to your custom value that are not already used in the Original Value, as Aurea 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.

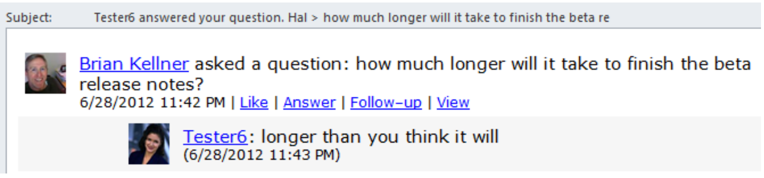
In notification email subject lines, the `{ActivityText}` token is replaced by the first 50 characters of the activity stream item, though ensuring to not break up words. This provides some indication to users as to the topic of the conversation.

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, the below pictures shows the configuration and the sample of email notification received when someone answers your question:

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

*Screenshot 235: Configuration*

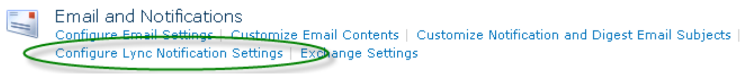



*Screenshot 236: This is how the email notification subject line looks like*

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 shows the starting text of the comment or answer when the subject is created.

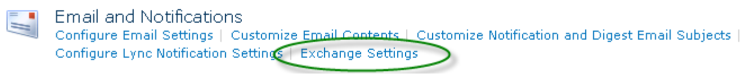
## Lync Notifications feature




*Screenshot 237: Configure Lync Notification Settings*

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

## Exchange Settings page




*Screenshot 238: Exchange Settings*

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 Aurea 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:

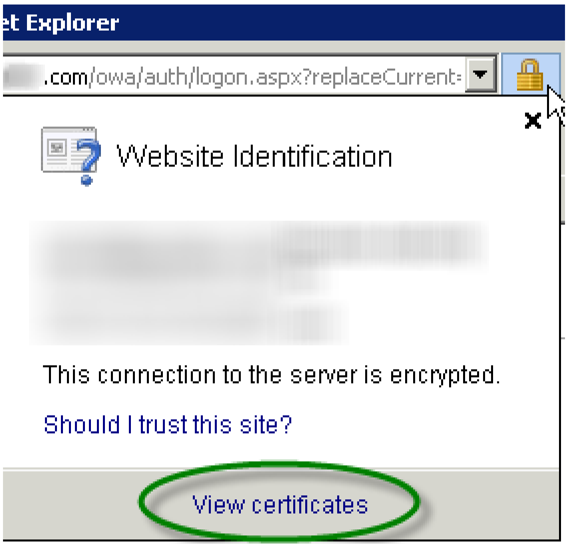
## Install Exchange, root authority, and other certificates into SharePoint

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:**

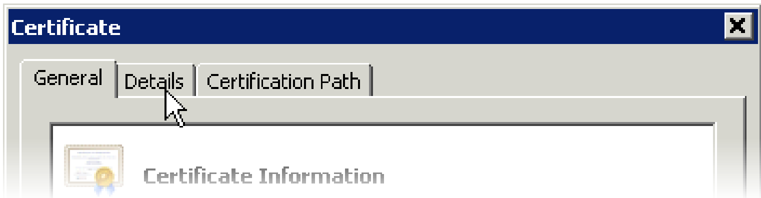
1. On the SharePoint server, open Internet Explorer and browse to the Exchange Webmail URL.

2. Near the Address Bar, click the Lock icon and click **View Certificates**.



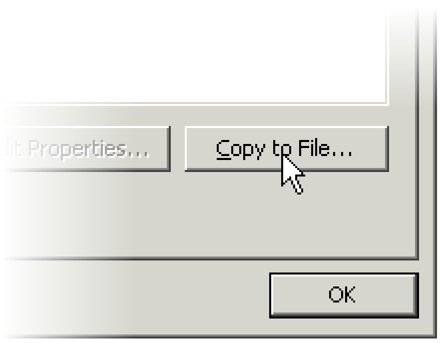

*Screenshot 239: Click **View Certificates***

3. In the **Certificate** window, go to the **Details** tab.




*Screenshot 240: Go to **Details** tab*

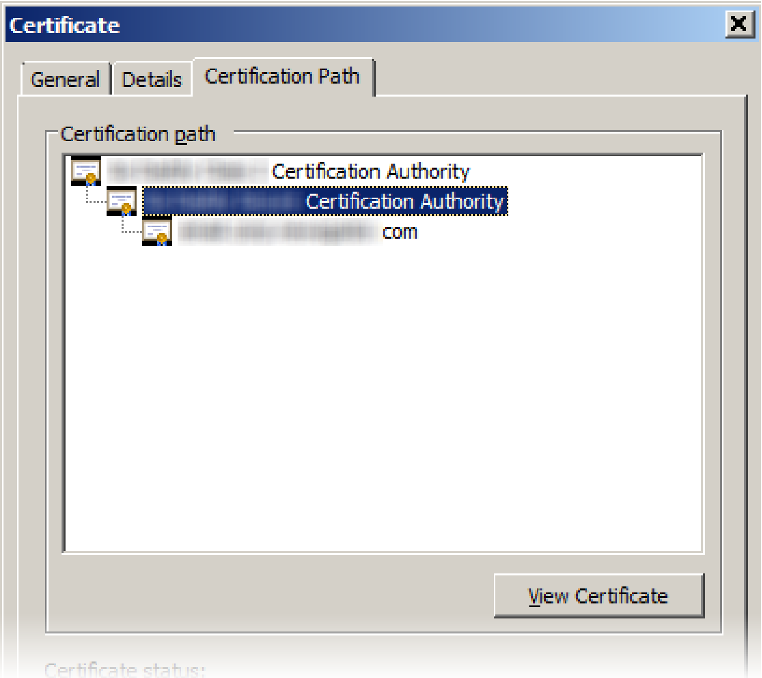
4. On the **Details** tab, click **Copy to File…**.




*Screenshot 241: Click Copy to File...*

5. Export the certificate in the **DER encoded binary X.509 (.CER)** format to somewhere easily accessible.

6. Click the **Certification Path** tab.




*Screenshot 242: Certificate Path*

7. 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.

8. Repeat steps C through E in each of the other certificate windows. You now have all the certificates required to install to SharePoint.

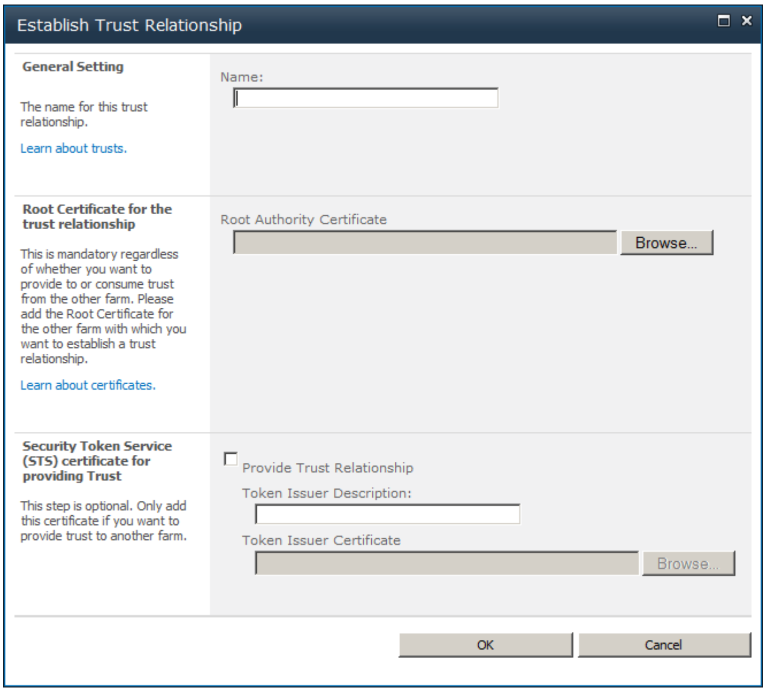
9. Close all your certificate windows when done.

**Install the Certificates:**

1. Open SharePoint Central Administration

2. Goto **Security > General Security** and click **Manage Trust**.

3. In the Ribbon, select **New**. The **Establish Trust Relationship** dialog appears.



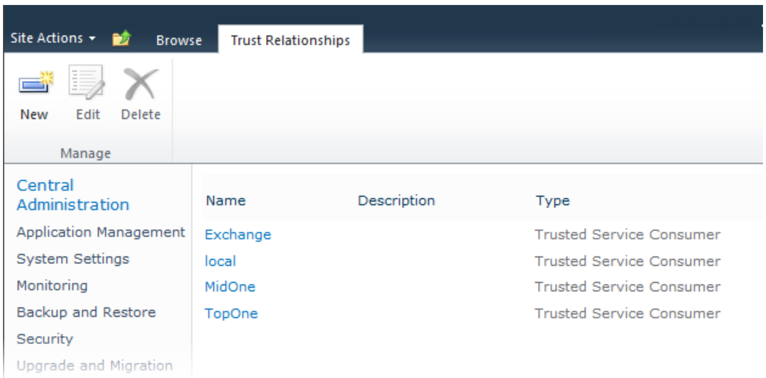

*Screenshot 243: Establish Trust Relationship diaglog*

4. At the top, give the relationship a name.

5. In the next section, browse to the root certificate you exported above.

6. Leave the rest as is, and click OK.

7. Do this as well for all the other certificates you exported above. When finished, it should look similar to this.




## 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:**

1. A domain administrator will need to create a service account in Active Directory.

2. 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).

3. Add the Application Impersonation role to the service account. One way to do this is by creating a role group with the Application Impersonation role, and with the service account as a member of the group.

**Install the Certificates:**

1. Open Central Administration.

2. Go to **Application Management >Manage Service Applications** and click the link for Secure Store Service (or whatever custom name you may have given yours).

3. If you have not yet generated an encryption key, it will ask you to **Generate New Key** on the ribbon.

4. Select **New** on the ribbon.

5. Enter a Target Application ID, something like “MyCompanyExchange”. Take note of this because you will use this later when configuring the Exchange integration.

6. Set the **Target Application Type** to “Group”.

7. 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).

8. 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 Aurea Social users … or at least those users who are to be able to use any of the Exchange integration features available in Aurea Social.

9. After the **Target Application** is created, select the drop down menu on your target application and select Set Credentials.

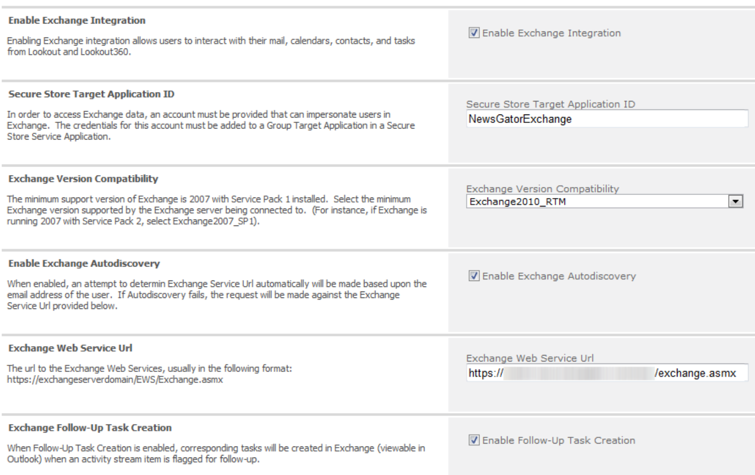
10. Set the user name, password, and domain of the service account you created for Exchange Impersonation.

11. Select **OK**

## Enabling Exchange Integration in Aurea Social

With the above preparatory steps completed, you are ready to provide Aurea 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.




*Screenshot 244: Exchange setting page*

You can perform the below settings here:

- 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 (for example, MyCompanyExchange).
- Set the Exchange Server compatibility version (for example, Exchange2010_RTM)
- Enable Autodiscovery
- Add the web service URL

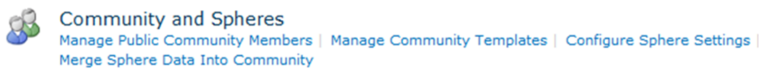
Click **Save** to commit your changes.

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

Check the **Enable Follow-Up Task Creation** box at the bottom of the Exchange Settings page to allow 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 Aurea Social causes the corresponding task to be marked as completed in Exchange.

## 1.35.5 Community and Spheres section




*Screenshot 245: Community and Spheres*

### Managing the Public Community Members group

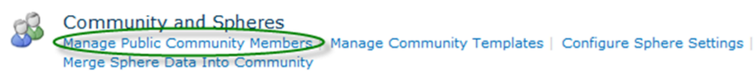
As of version 2.0, Aurea Social allows you to specify what security principals should represent your "public" access. This is done in Central Admin in the NewsGator Social Platform Services management.

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.

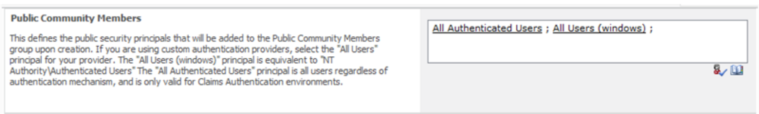
To change which security principals comprise this group, do the following:

Click **Manage Public Community Members** in the **Community and Spheres** section of the NewsGator Social Platform Management page.




*Screenshot 246: Manage Public Community Members*

This opens an editbox displaying the current security principals that comprise the **Public Community Members** group.




*Screenshot 247: **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 are automatically made in all existing instances of the Public Community Members group in existing site collections and sites.

Removal of principals from this list is not 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.

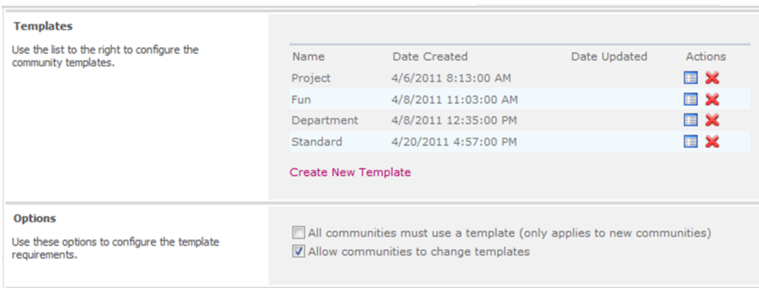
## Managing Community Templates


*Screenshot 248: Managing Community Template*

Saving an existing Aurea Social community as a SharePoint site template does not work properly as a means of creating new communities. Aurea Social instead provides its own means for creating templates for new Aurea Social communities.

To access this capability, to the following:

1. Go to **NewsGator Social Platform Management page > Community and Spheres > Manage Community Templates**. Manage Community Templates page is opened. With a community template, you can pre-define what lists and tabs will be a part of a new community, and in what order.



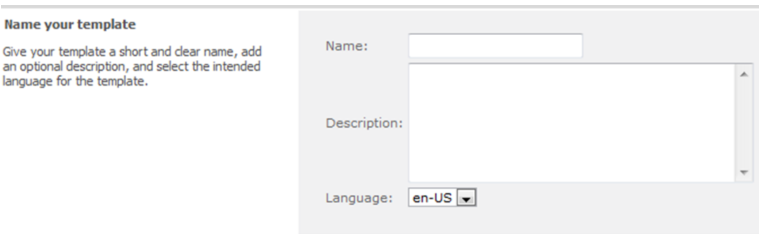

*Screenshot 249: Configure the community templates*

2. In the options section:

» Check the **All communities must use a template (only applies to new communities)** checkbox to make it compulsory for all new communities to use a template.

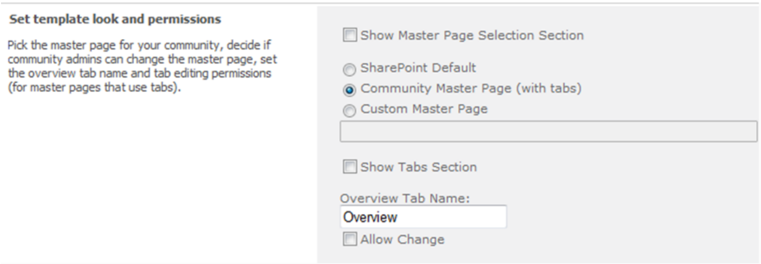
» Check the **Allow communities to change templates** checkbox to determine if a community admin can switch to a different template after the community is created.

3. Click the **Create New Template** link to open a screen. The first section is **Name your template**. Enter name and description of the template.




*Screenshot 250: Name your template screen*

4. In the **Set template look and permissions** section, choose a template and configure settings for the Overview tab (if your template has one).




*Screenshot 251: **Set template look and permissions** section*

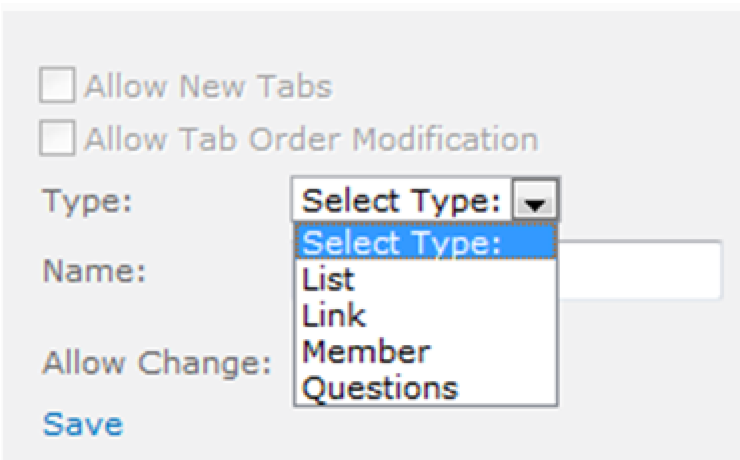
5. In the bottom section you can control navigation links and specify what lists (and corresponding tabs if your template uses tabs) will be in the community to start. It also allows specifying features that are activated automatically when the community is created.

» **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 (that is, **Site Settings > Tree View**)

» **Replace SharePoint Top Links with Community Tabs:**

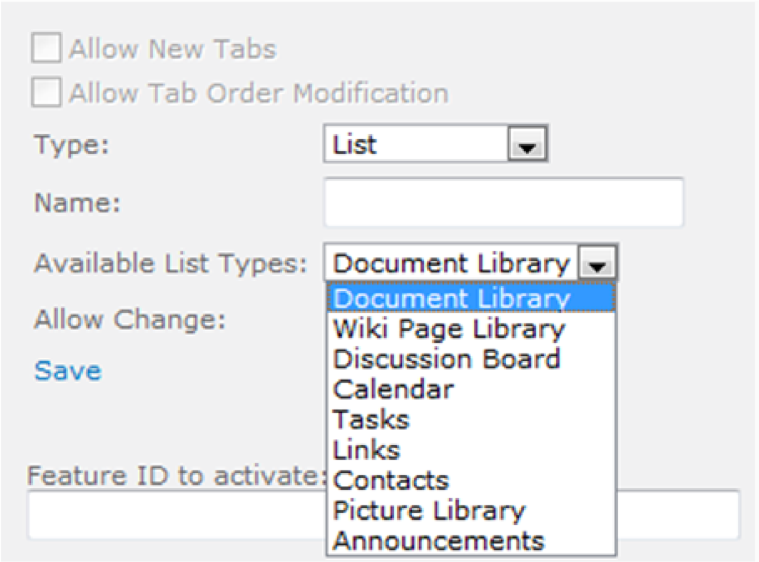
- **If on 2010 and using our NewsGatorSkin masterpage**: When checked, this simply enables our tab control. When unchecked, the traditional SharePoint header navigation is restored and can be managed using the standard SharePoint navigation controls
- **If on 2013 or on 2010 and NOT using the NewsGatorSkin masterpage**: When checked, 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 unchecked, the header navigation links are managed by SharePoint.

6. To add a tab, select the type in the dropdown.




*Screenshot 252: Select the type from the dropdown*

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




*Screenshot 253: Select secondary choice*

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

## Setting up Aurea 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

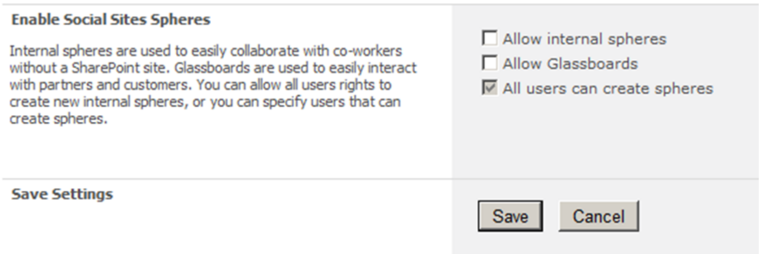
They are listed among the @-target autocomplete options for those who follow them. Clicking the name of the sphere in an activity stream item displays a sphere view, where users can target new microblogs or questions to the sphere, respond to existing microblogs or questions, view the people following 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:


*Screenshot 254: A sphere*

To enable the Spheres feature, do the following

1. Go to **NewsGator Social Platform Management** > **Community and Spheres** > **Configure Sphere Settings**. Enable Social Sites Sphere

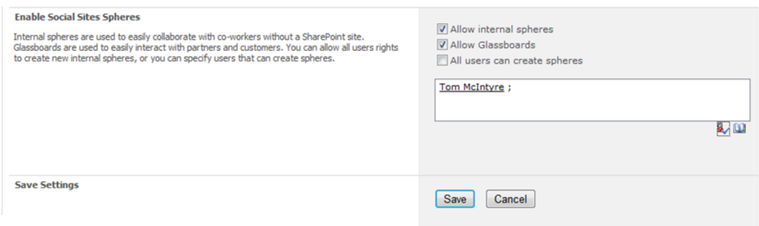



*Screenshot 255: **Enable Social Sites Sphere** page*

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

> **Note:**
> By default, all users can create spheres. To restrict Sphere creation to a group of people you specify, uncheck All users can create spheres.

3. A People picker control appears, as pictured below. Use it to identify to Aurea Social which users will have the right to create spheres.



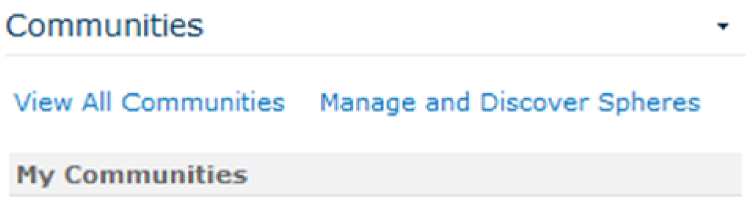

*Screenshot 256: People picker control*

> **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.

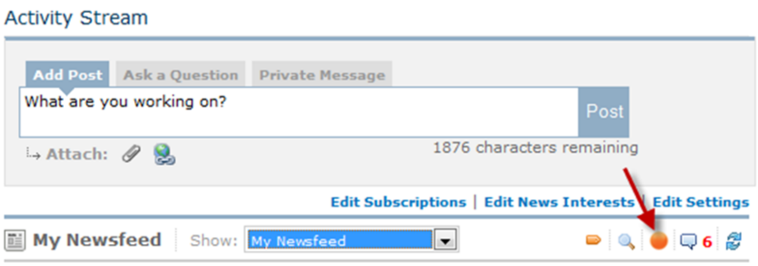
4. Click **Save** to commit all changes.

## 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.

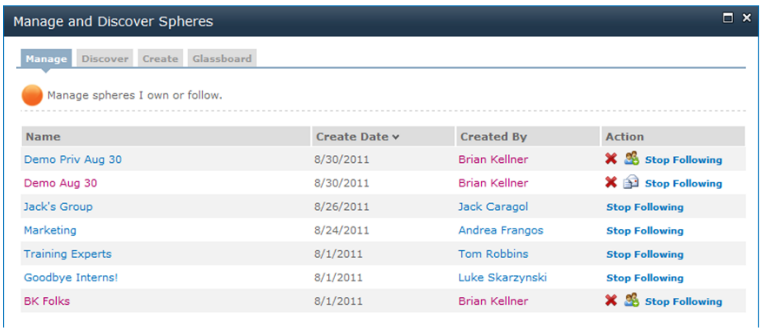



*Screenshot 257: Communities web part*




*Screenshot 258: Activity Stream*

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.

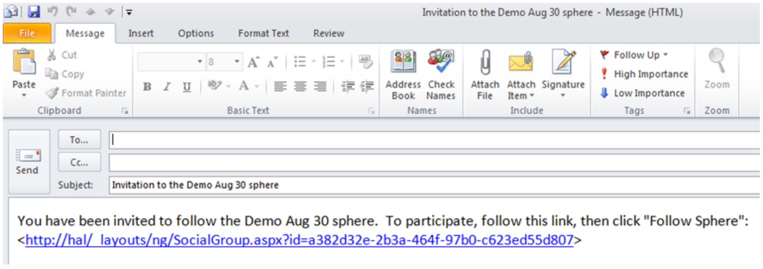



*Screenshot 259: Manage and Discover Sphere*

The Manage tab allows user to stop following a sphere they have previously chosen to follow. If a user owns (created) any spheres, additional options are shown. The icon allows the owner to delete a sphere. This causes 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 icon allows an owner to edit the membership of a private sphere.

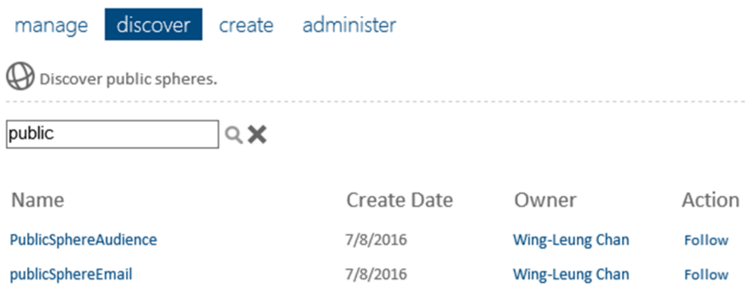

*Screenshot 260: Edit members of a group*

The icon allows the admin to invite others to follow a sphere by creating an email like the one shown below.




*Screenshot 261: Invitation follow a sphere*

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.

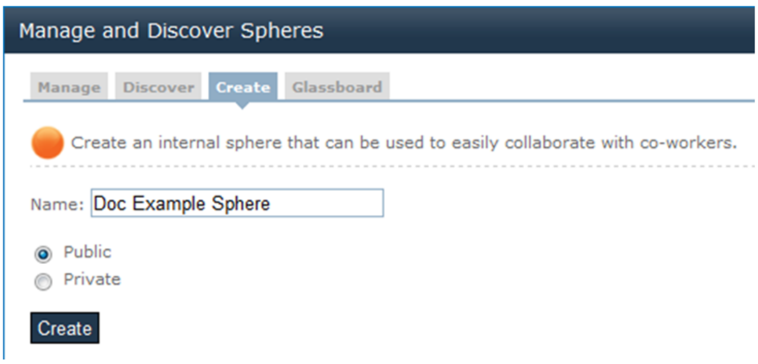



*Screenshot 262: Discover tab*

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

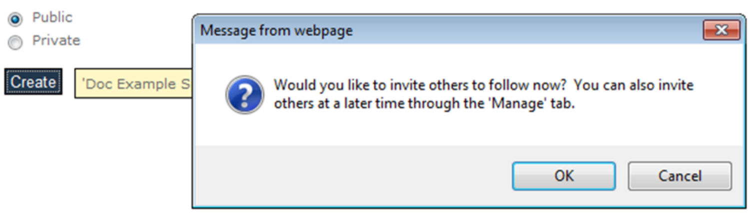
## Creating Public Spheres

To create a public sphere, the user only needs to enter a name and click **Create**.



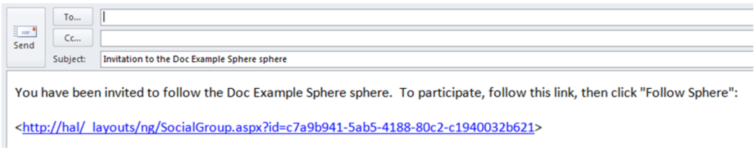

*Screenshot 263: Create public sphere*

The screen responds with a successful creation message and the option to send email invitations.




*Screenshot 264: Click OK to send invitation*

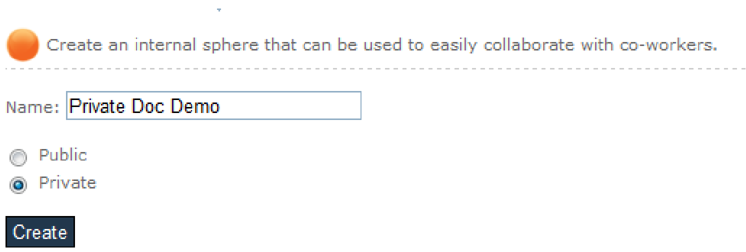
Clicking **OK** opens an email that makes it easy to invite others to join the Sphere.




*Screenshot 265: Send email to invitees*

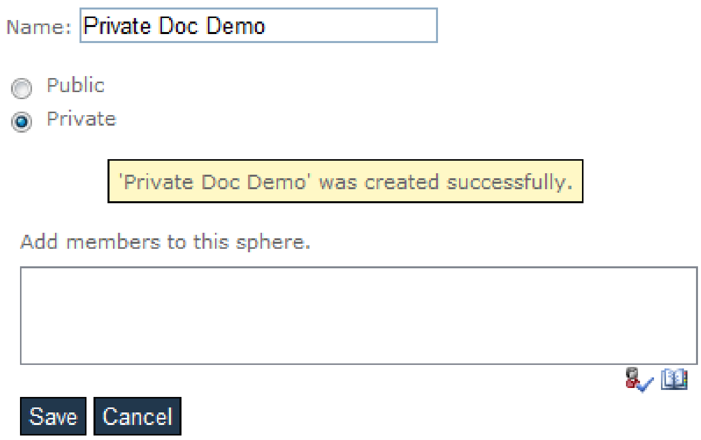
## Creating Private Spheres

Creating a private sphere starts in exactly the same way as public sphere.



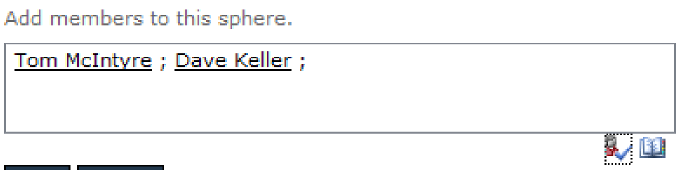

*Screenshot 266: Click **Create***

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




*Screenshot 267: Add members to sphere*

After you have added the members you want, click the **Save** button. Private spheres is visible in the **Manage** tab.




*Screenshot 268: Click **Save** after adding members*

## Merge Sphere Data Into Community


*Screenshot 269: Click **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 (for example, 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.).

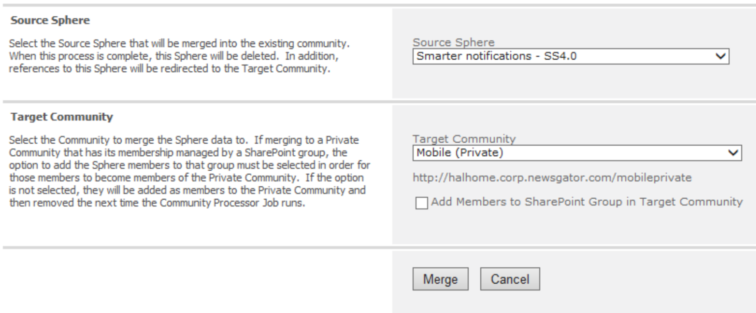
To merge the conversation from a sphere into a community, do the following:

1. Create a destination community.

2. From the **Merge Sphere Data Into Community** screen, select the sphere whose data you want merged.

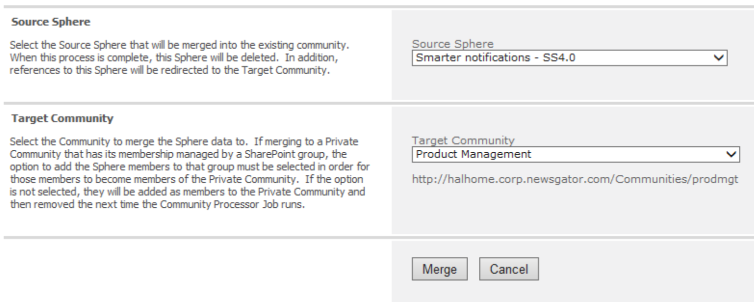
3. Now, select the target community into which you want to merge the data.

» If you pick a private community to merge the data into, you are asked to decide whether you want to give the sphere members access within the private community as shown below.



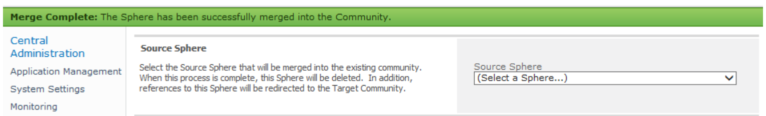

*Screenshot 270: **Sphere Data Into Community** screen for private community*

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



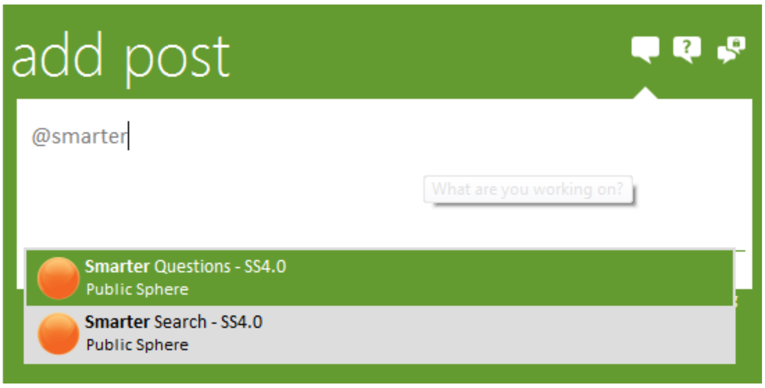

*Screenshot 271: **Sphere Data Into Community** screen for public community*

4. Upon completion a status message is displayed.




*Screenshot 272: Status message on completion*

At this point, the sphere is no longer a valid @ target.

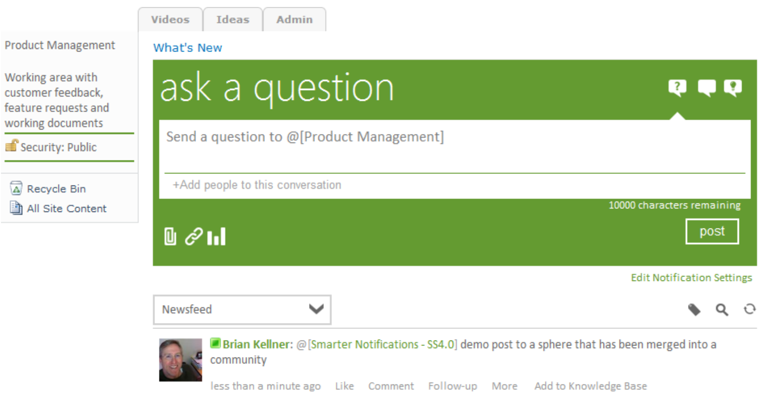



*Screenshot 273: Sphere is not a valid @target after it is merged*

If a user manually target the sphere by typing in the full @ name, the post is automatically sent to the community as shown below.


*Screenshot 274: If you manually type the full name of the sphere, the post is automatically sent to community*

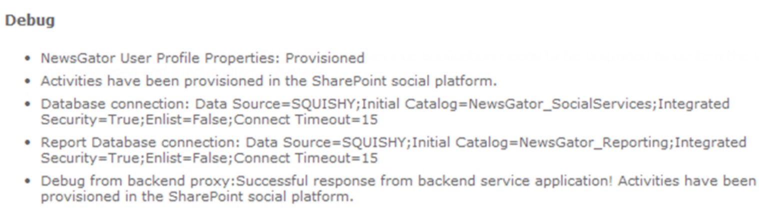
The sphere name typed in by the user still displays in the stream item to give context. Clicking on the sphere name when it is linked will now bring users to the community.




*Screenshot 275: Typed sphere name still displays in the stream*

Data created in the sphere is not be counted toward community reporting or badging totals.

## 1.35.6 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.

*Screenshot 276: Debug information and messages*

The debug section should be referenced when you see errors that cause you to suspect Aurea Social is not able to connect to its social database, its reporting database, or its service application.

Above picture is a depiction of the kinds of information and messages you 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 do not show, then 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 "Service Application Proxy" in the topic Maintenance section.

## 1.36 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.

### 1.36.1 Creating a community

In Aurea 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 the three means follows:

- by creating a new site
- by creating a new site collection
- by converting an existing site

#### Note on permissions inheritance

> **Warning!**
> Converting an existing site to a community causes 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.

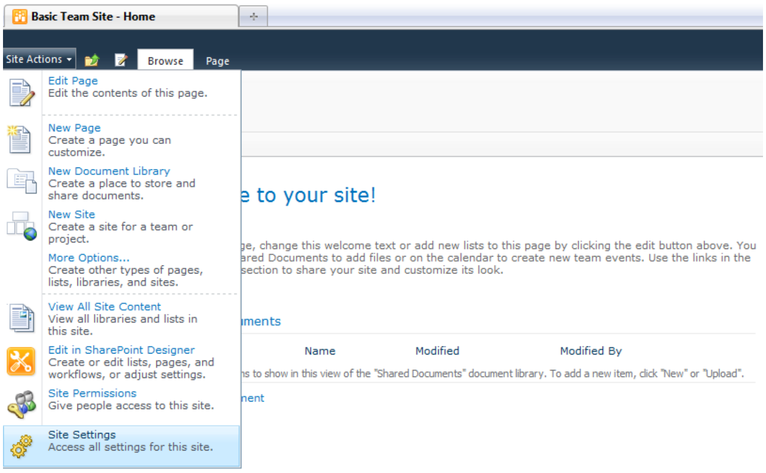
As a consequence, any existing site that inherits permissions from its parent that is then converted to a community by activating the NewsGator Community Web site feature has that permissions inheritance broken.

Administrators can manually re-establish permissions inheritance in such cases, if desired.

## Converting an existing site into a community

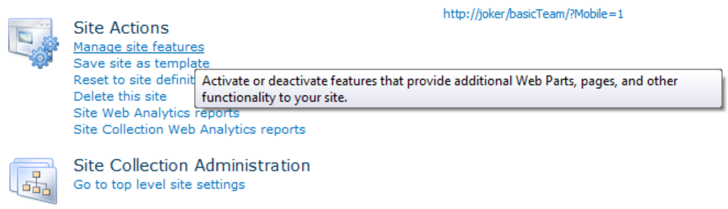
A non-community site can be converted into a community using the **Community Web** feature. To convert, do the following:

1. Go to the **Site Action > Site Settings** for the site.



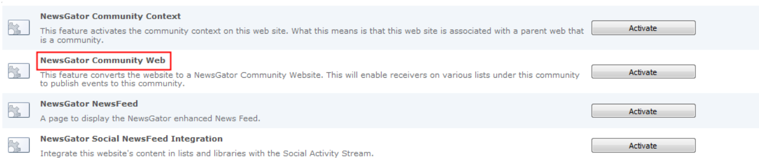

*Screenshot 277: Navigate to Site Settings*

2. From here, click the **Manage site features** link.




*Screenshot 278: click the **Manage site features***

3. Activate the **NewsGator Community Web** feature.

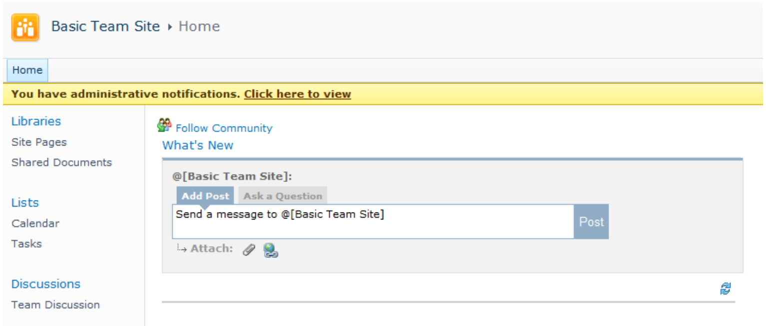



*Screenshot 279: Click **Activate***

This automatically activates the **Web Context** feature and the **Social Newsfeed Integration** feature. These are infrastructural features to capture events.

After this feature is active, the follow/stop following control and activity stream are automatically added to the front page of the team site.

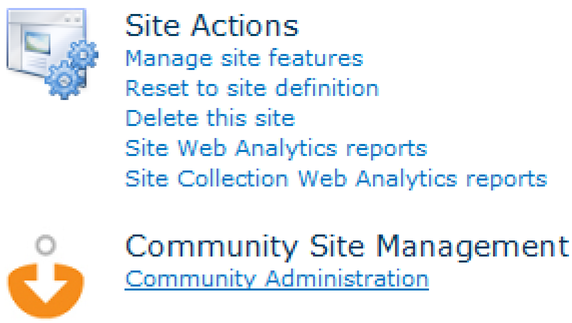
Any notifications is displayed to site owners in the yellow message bar. Admins can customize the layout and add the community members part if thumbnails and access to a members page is desired.




*Screenshot 280: Notification displayed on yellow ribbon*

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.

For further details, see Creating and setting up a brand new public community (site-level).



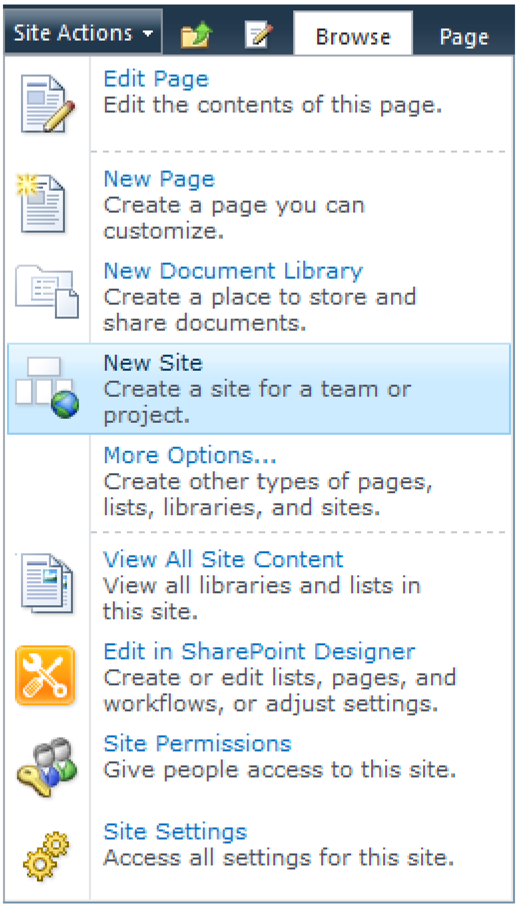

*Screenshot 281: Site Settings page*

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

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

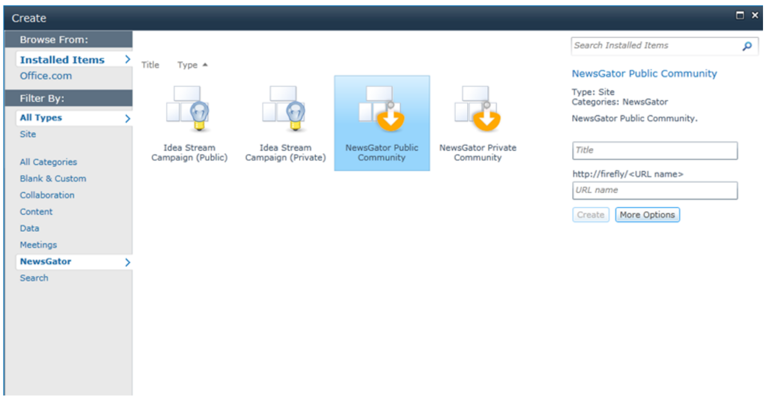
Communities are created through the **Community Creation** wizard or by activating the **Community Web** feature on an existing site.

1. Navigate to **Community Creation** wizard.




*Screenshot 282: Click New Site*

2. On the following screen, select the **NewsGator Public Community** option and enter a name and a URL.

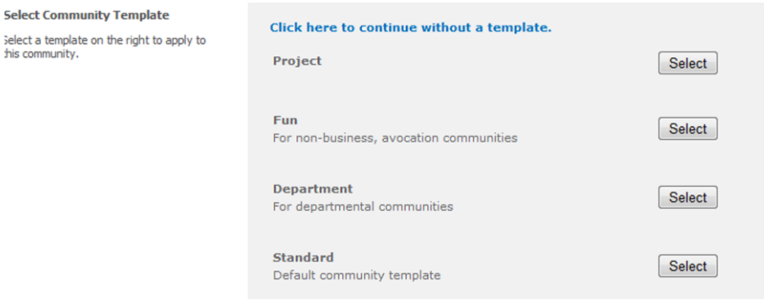



*Screenshot 283: Click **NewsGator Public Community***

3. Click **Create**. The screen that appears next depends on whether templates have been defined.

For further details for instructions on defining templates, see Manage Community Templates section.

The view below shows a case where four templates have been defined, but community creators are free to create a community without a template.




*Screenshot 284: Four templates defined*

Selecting a template displays community options depending on what was enabled in the template definition.

Click **Click here to continue without a template** to display all community options.

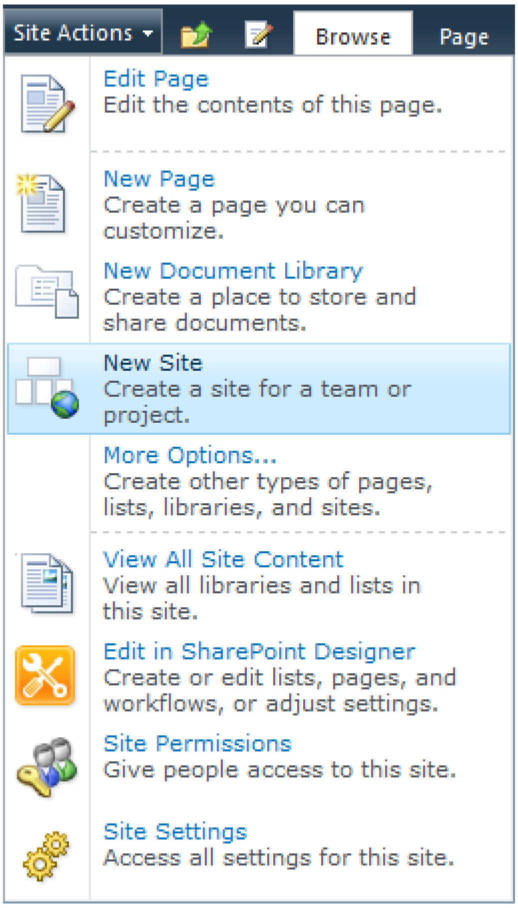
If there is no templates defined, you go directly to the screen displaying all community options. Filling out this community setup page is the last step of the community creation process.

Due to this, page has 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.

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

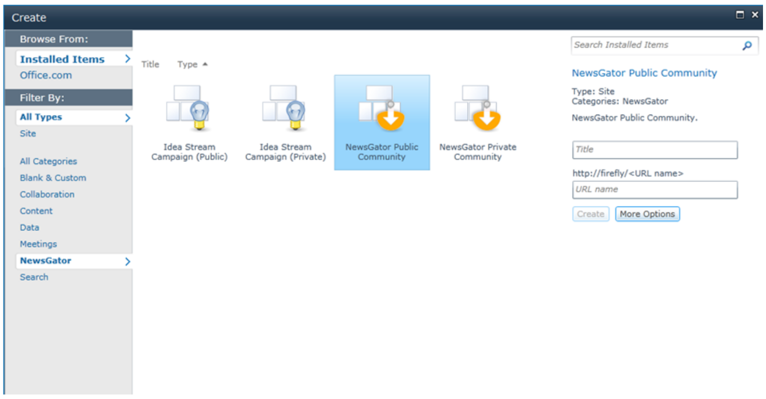
Communities are created through the **Community Creation** wizard or by activating the **Community Web** feature on an existing site.

1. Navigate to **Community Creation** wizard.




*Screenshot 285: Click New Site*

2. On the following screen, select the **NewsGator Private Community** option and enter a name and a URL.

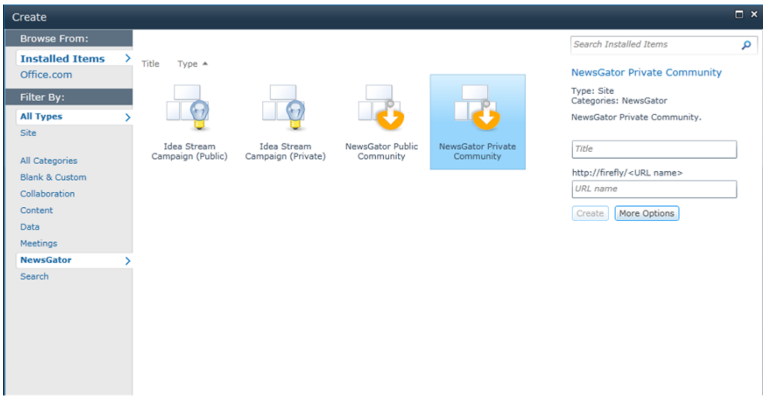



*Screenshot 286: Click **NewsGator Public Community***

3. Click **Create**. The screen that appears next depends on whether templates have been defined or not.

For further details for instructions on defining templates, see Manage Community Templates section.

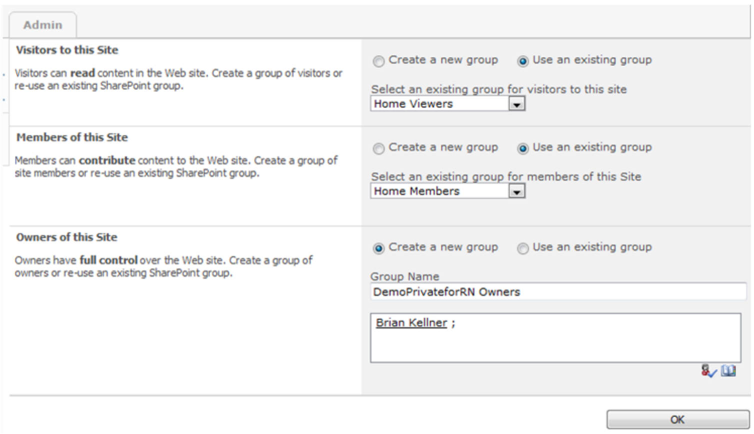
The view below shows a case where four templates have been defined, but community creators are free to create a community without a template.




*Screenshot 287: Four templates defined*

Selecting a template displays community options depending on what was enabled in the template definition.

After clicking **Create**, a security page is displayed (like the one shown below). This is the only step that is not included in the public community creation process.




*Screenshot 288: Security page*

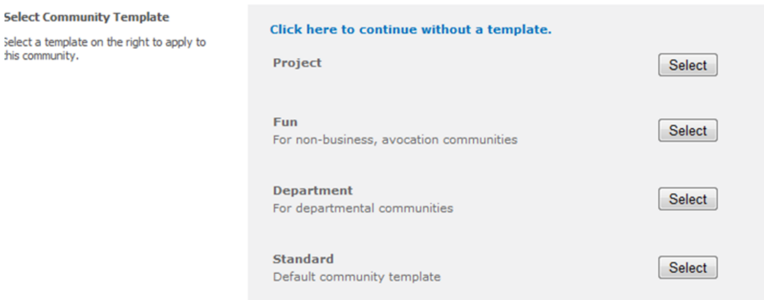
> **Note:**
> If you make selections here that include the **Public Community Members** group, when your community is complete you receive an admin notification that your community security settings do not match your choice of making a private community.

For more information on the Public Community Members group, see Public Community Members section.

Click OK. After clicking **OK** on the security settings page, which screen appears next depends on whether templates have been defined.

For further details for instructions on defining templates, see Manage Community Templates section.

The view below shows a case where four templates have been defined, but community creators are free to create a community without a template.




*Screenshot 289: Four templates defined*

Selecting a template displays community options depending on what was enabled in the template definition.

Clicking **Click here to continue without a template** displays 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 has 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.

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

In Aurea 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.

For further details for instructions on how to create a community as a site, see Creating and setting up a brand new private community (site-level) and Creating and setting up a brand new public community (site-level).

To create a community as a site collection, do the following:

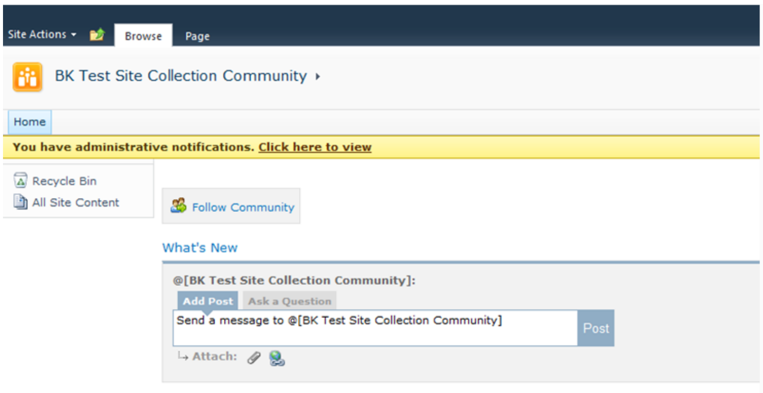
1. Select a site collection template during the regular SharePoint site collection creation process. The screenshot below shows the template section for site collection creation.


*Screenshot 290: Template section for site collection*

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

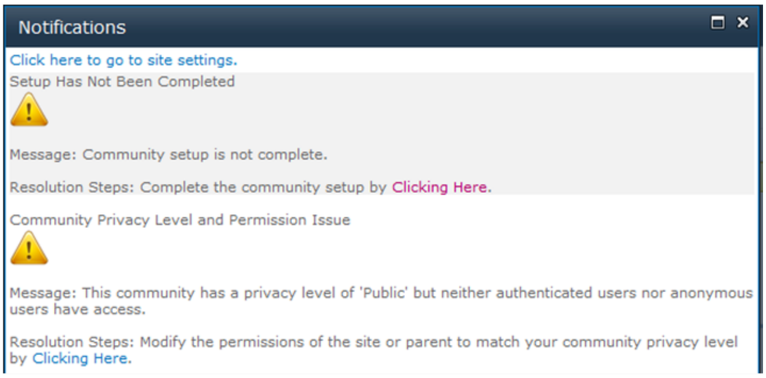
> **Note:**
> The Idea Stream entries are only present if the Idea Stream module is loaded.

After creating the site collection, your community looks nearly like the image below.




*Screenshot 291: Community after creating site collection*

Click the link in the yellow notification bar to display any errors or warnings you need to address.




*Screenshot 292: Notifications screen*

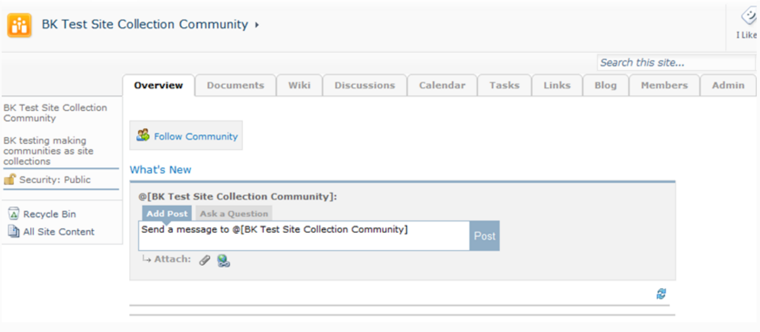
> **Note:**
> You always get the **Setup Has Not Been Completed** message when creating a community as a site collection using either community template in Central Administration.
> This is because, unlike when creating a community as a site, Aurea Social does not gain control and therefore cannot automatically 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**.

Click on **Complete the community setup by Clicking Here**.

This brings you to the community setup page. Enter details on this community setup page. This 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.

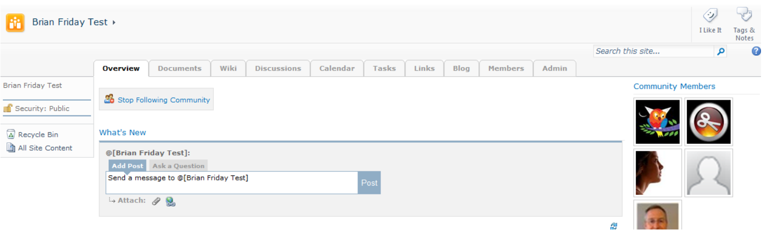
If on the community setup page you choose to enable the Aurea Social default master page for communities, your site collection-level community looks just like a community created at the site level.



*Screenshot 293: Site collection-level community*

## 1.36.2 A tour through your new community

The screenshot below depicts a community created through this wizard and using the NewsGator Master Page.



*Screenshot 294: A community 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 Aurea Social. Each of these are detailed below:

### The Overview (default) tab

When you navigate to a community, the first tab you see is the **Overview** tab.

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.

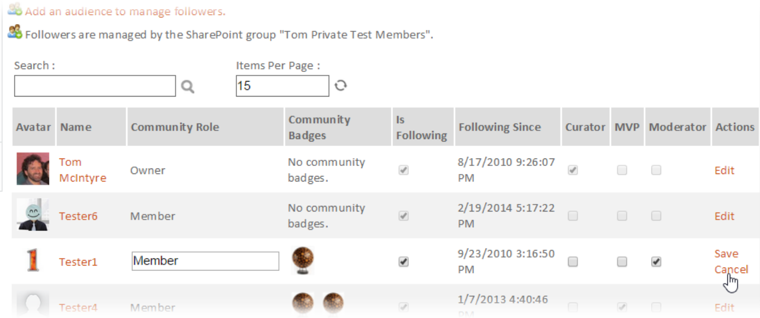
The **Follow / Stop Following** link above the **Activity stream** gives users an easy way to choose to follow this community.

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.

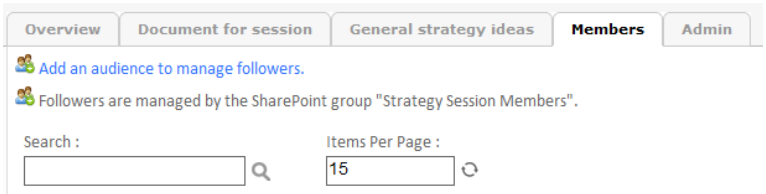
### The Members tab

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.




*Screenshot 295: Members Tab view*

From version 3.5, site owners can 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).




*Screenshot 296: Add an audience to manage followersvlink is displayed if the owner has the Manage Audiences permission*

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 is displayed here instead, with a link to allow changing the audience selection.

Almost all communities have a SharePoint group that is designated as the Members group. On such communities there is a statement in the Admin Links web part giving the name of that community's Members group.

Aurea Social causes anyone added to this group to be automatically followed to the community.

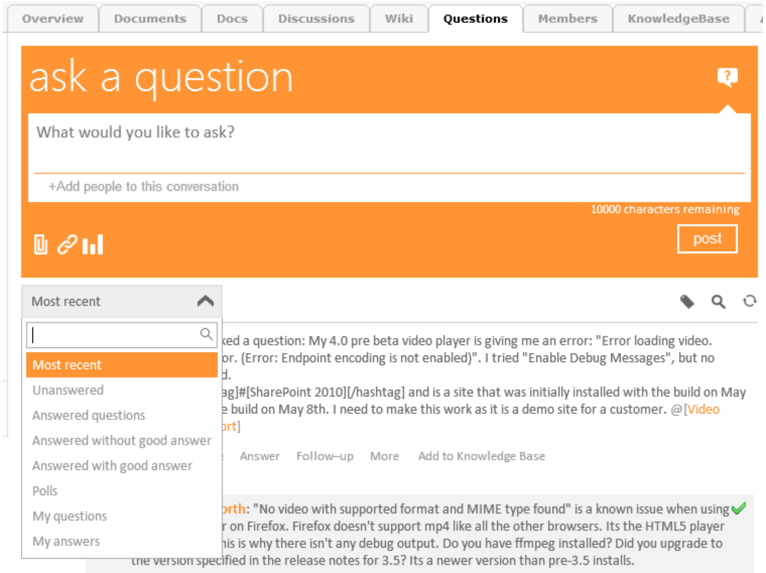
Use of this group for managing followers is described in detail in the the topic, Setting Community Followers using the default Members Group section.

## 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,

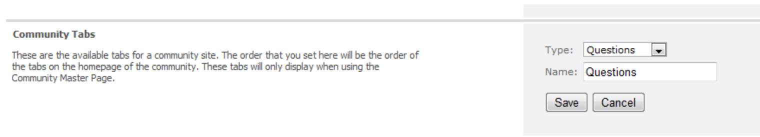
- with the filter **Unanswered** to help curators stay on top of questions that need answering
- with the filter **Answered without Good Answer** to help curators and questioners give feedback to those who provided an answer




*Screenshot 297: Questions tab*

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.

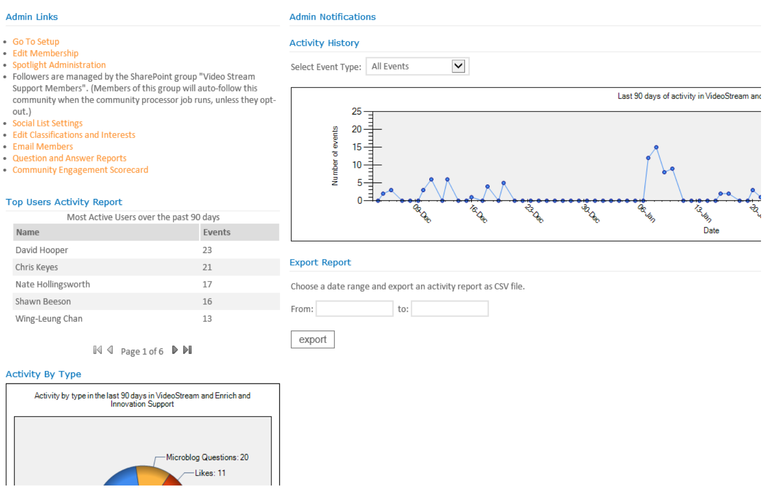
When using the tabbed master page, you can add a new Questions tab or define one to be included in templates.




*Screenshot 298: Add a new Questions tab*

## The Admin tab

The Admin tab provides reporting and controls for community administrators.



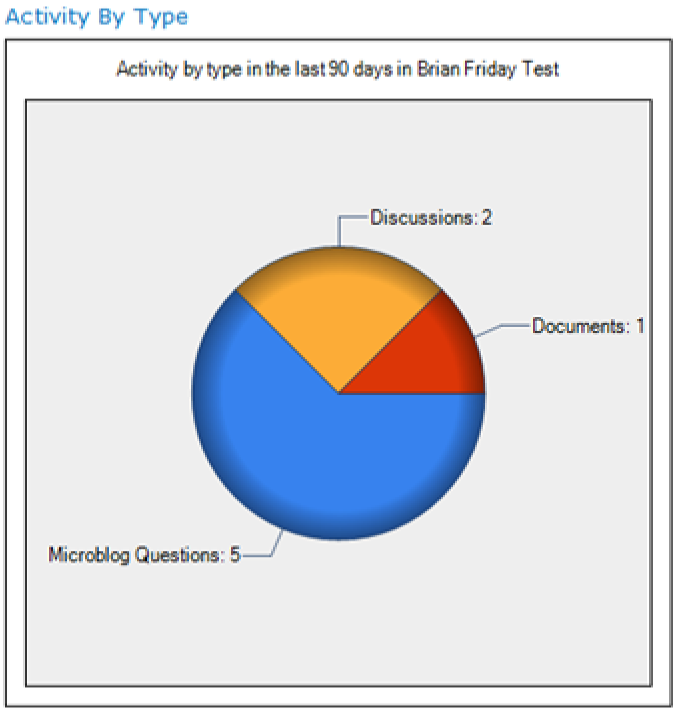

*Screenshot 299: Reporting and contols*

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

### 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.

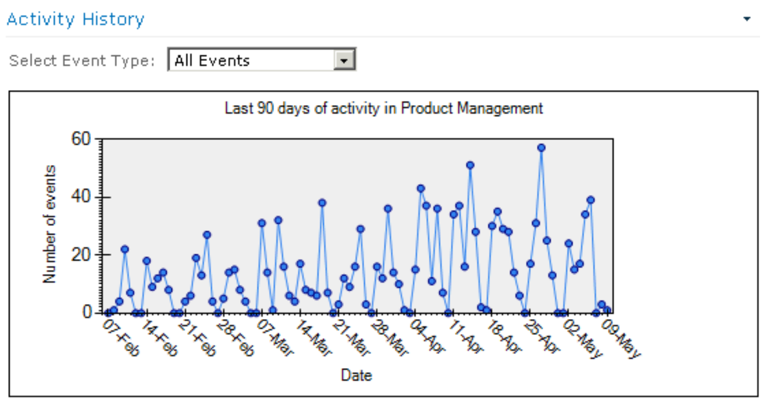



*Screenshot 300: Activity By Type*

### Activity History

Displays an historical trendline 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.




*Screenshot 301: Activity History*

### 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 to drive participation.

When this web part is placed outside of a community, it shows data across the entire system.

**Top Users Activity Report**

Most Active Users over the past 90 days

| Name | Events |
|---|---|
| CORP\tester6 | 4 |
| CORP\SeñorTester | 2 |
| CORP\briank | 1 |
| Rob Ponti | 1 |

*Screenshot 302: Top Users Activity Report*

## 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.

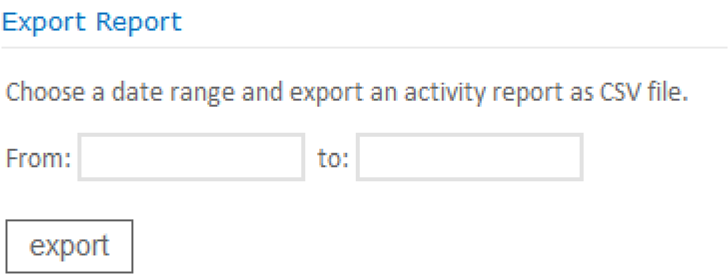
This web part allows exporting the data into `csv` format which can be readily used in Microsoft Excel for additional reporting. This web part is deployed by default on the Admin tab of communities.

Clicking in the **From** or **To** boxes brings up a date selector control.

After selecting the data range and clicking **export**, your browser prompts you to allow opening or saving a file.

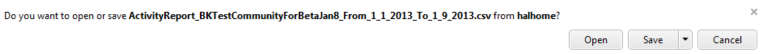
The data is provided in three main columns when viewed from a community. They show the date, user and type of action.

> **Note:**
> This export web part is also available on the global reporting page and there it exports data on a global scope.




*Screenshot 303: Export Report window*


*Screenshot 304: Select date range*




*Screenshot 305: Click **Open** or **Save***

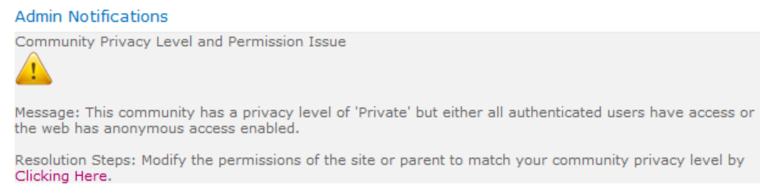
| Date | User | Activity Type |
|---|---|---|
| 1/9/2013 | corp\tester6 | Document |
| 1/9/2013 | Brian Kellner | EditDocument |
| 1/9/2013 | Brian Kellner | Document |
| 1/9/2013 | Brian Kellner | EditDocument |

*Screenshot 306: Exported excel*

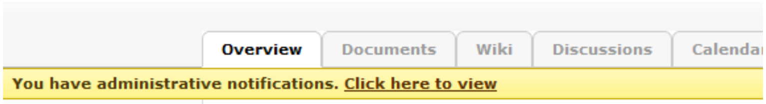
### Admin Notifications

Notifies community admins of important issues that need to be resolved.

When there are such issues, admins see a yellow alert bar when arriving at the community, providing a link that pops up the same message is found by viewing this web part on the Admin tab.



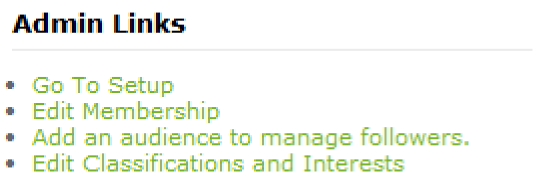

*Screenshot 307: Admin Notifications*




*Screenshot 308: Sample notification*

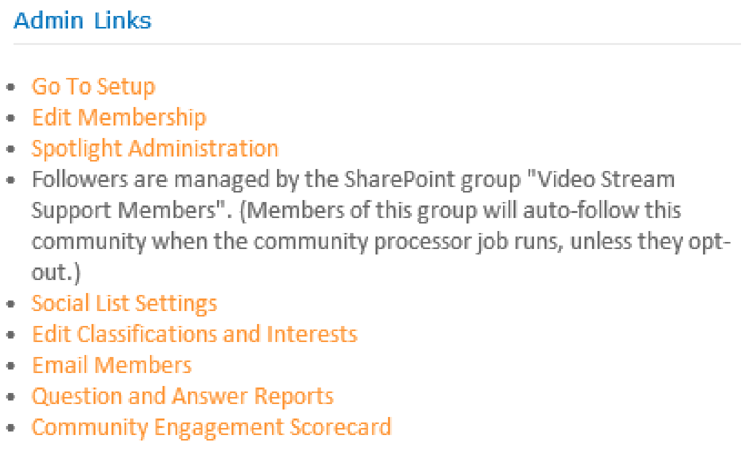
### Quick Admin

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").




*Screenshot 309: Quick admin links*

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 picture.




*Screenshot 310: Admin Links*

The various admin links are explained below:

» 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 is 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 has a SharePoint group that is designated as the Members group. On such communities there is a statement in the **Admin Links** web part giving the name of that community's Members group. Aurea Social causes anyone added to this group to be automatically followed to the community.

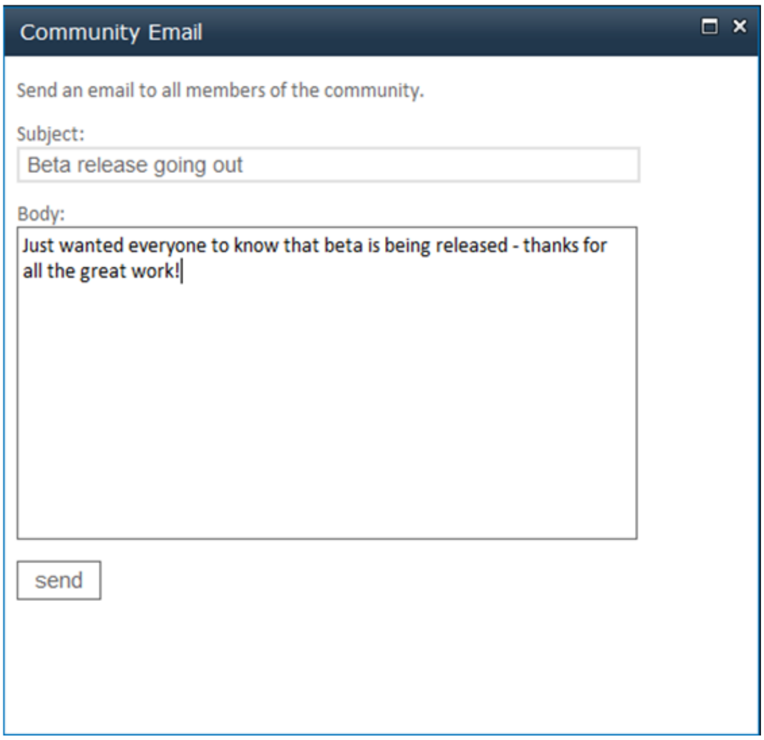
Use of this group for managing followers is described in detail in the Setting Community Followers Using the Default Members Group section.

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.

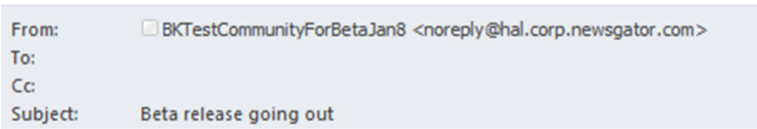
» **Edit Classifications and Interests** opens a dialog that allows two types of tags to be connected with the community. These are described in detail in the Community Interests and Community Classification sections, below.

» **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.



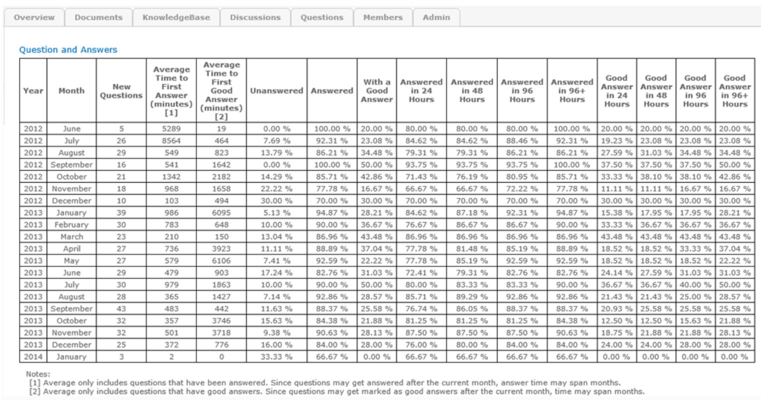

*Screenshot 311: Community Email dialog box*

Clicking the **Send** button causes an email to be sent with recipients as BCC addresses and with the community as the sender.




*Screenshot 312: Sent email*

The **Question and Answers Report** provides 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.

*Screenshot 313: Question and Answers*

- The **Community Engagement Scorecard** link appears if the Engagement Scorecard solution has been installed. Please the Engagement Scorecord documentation for more details.
- The Admin Notifications web part displays messages if Aurea 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 still causes events in the activity stream.

- Documents
- Pictures
- Links
- Tasks
- Contacts
- Calendar
- Wiki
- Announcements
- Discussion
- Blog

> **Note:**
> If a blog post requires approval, it never generates an event. Blog posts which are directly published after writing do create events.

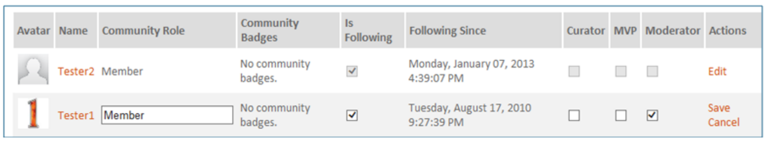
## 1.36.3 The Community Moderator role

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.

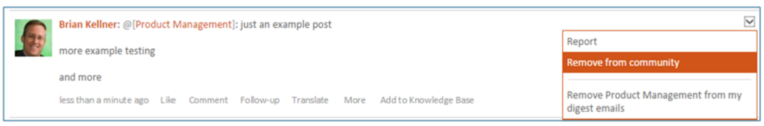
Moderators are specified by having an existing a community owner or a moderator edit a user row on the **Members** tab.




*Screenshot 314: Moderators can edit a user row*

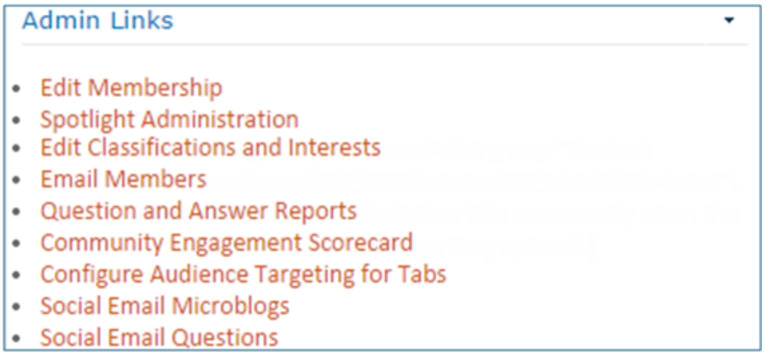
Moderators can also give people the “curator” and “mvp” designations on this page.

Moderators can remove posts from displaying in the community stream.




*Screenshot 315: Moderators can remove post*

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




*Screenshot 316: Admin Links*

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

## 1.36.4 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)

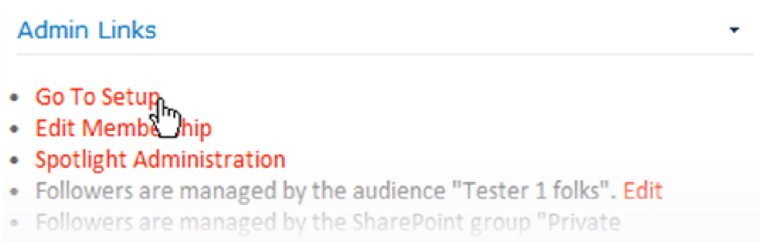
» The **Admin** tab of the community (in untabbed communities this can be accessed via **Site Actions** > **Site Settings** > **Community Administration**)

» 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

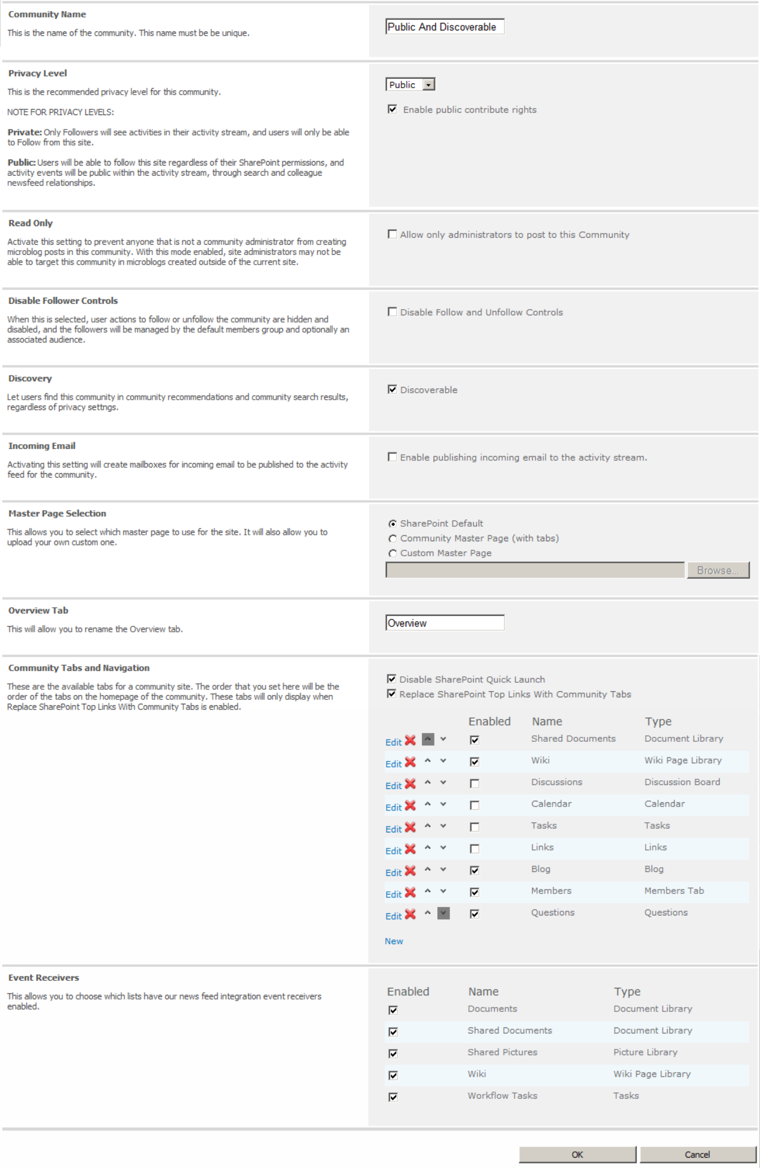
To access community setup page, go to the **Admin** tab of a community and click the **Go To Setup** link at the top of the **Admin Links** section:




*Screenshot 317: Click **Go To Setup***

> **Note:**
> 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:




*Screenshot 318: Community Administration*

Make entry on this according to the instructions below and 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 results 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.

For further details, see Public Community Members section under Section-by-section description of the NewsGator Social Platform Management page.

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 are redirected to a security page on which you can define which users has **Visitor**, **Member**, or **Owner permissions** in the community.

An action that a user takes in a Public community shows to all members of that community AND all people who are following that user as a colleague. An action taken in a Private community ONLY shows to followers of that community.

> **Note:**
> 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 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 is simply treated as text, not sent to the community, and not linked in the activity stream.

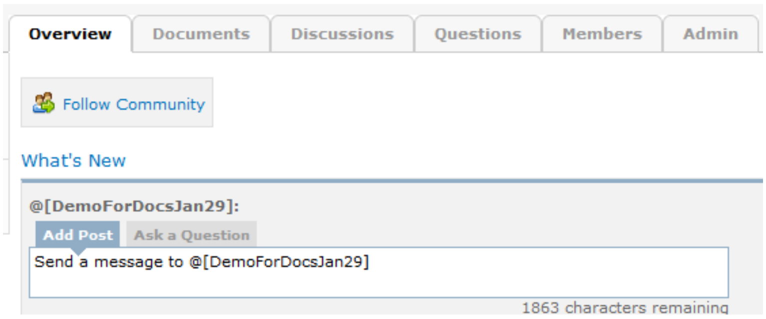
> **Note:**
> This setting does not affect SharePoint permissions on the lists and libraries in a community. If users are still able to contribute to them, activity stream events is created when new documents, wikis, blogs, etc. are created.
> Similarly, enabling features such as inbound email or ideas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

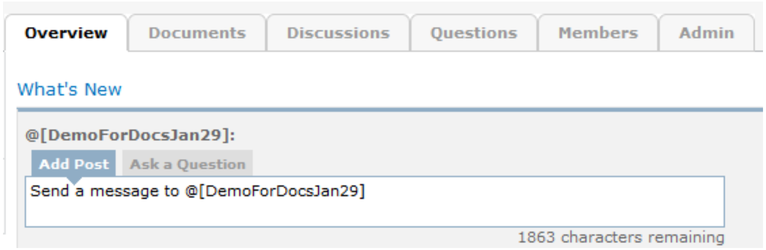
A setting on the Setup page for a community (accessible via the **Go To Setup** link on the Admin tab) allows a community administrator to implement this choice.

Enabling this setting removes the **Follow Community** control. Here is the community with the control visible.




*Screenshot 319: Follow Community control is visible*

This screenshot shows what the community looks like with the control disabled.




*Screenshot 320: Follow Community control is not visible*

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.


*Screenshot 321: Recently Created Communities web part*

## Discoverability setting

The **Discoverable setting** lets you control whether this community is 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

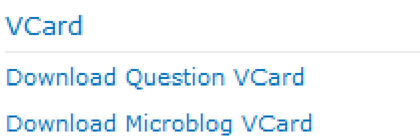
In addition to global emails (see Global Email Addresses for microblogging and asking questions), individual community owners can enable inbound microblog and question addresses for their specific community.

The setting for this is in the Incoming Email section of the community's Setup page:


*Screenshot 322: Incoming Email section*

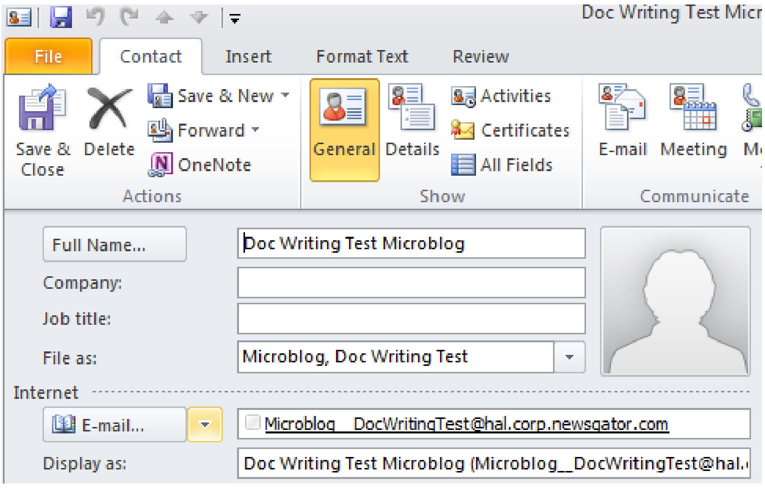
When this is enabled by checking the **Enable publishing incoming email to the activity stream** checkbox, announcement lists are created within the community and given specific email addresses.

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.



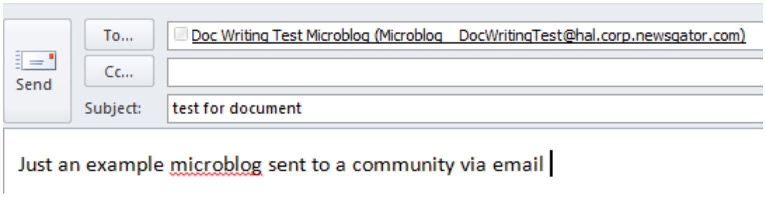

*Screenshot 323: VCard web part*

Users can click the links to add the addresses to their contact lists like any other Vcard.




*Screenshot 324: Click the link to add address*

To email the community, the user simply selects the address and sends the email.




*Screenshot 325: Select address and send email*

The result is just like sending to the global address, but the message targets 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 Aurea 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).

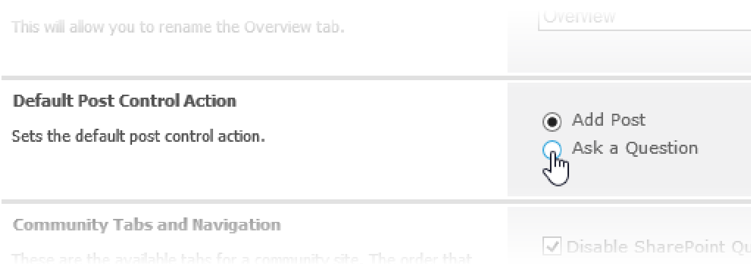
## Setting to default posts to questions instead of microblogs

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 Aurea 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, do the following:

1. Go to the **Admin** tab of the community
2. Click the **Go to Setup** link to get to the **community Setup** page.
3. Find the **Default Post Control Action** section (pictured here) and
4. Select **Ask a Question**.
5. Click **Save** at the bottom of the Setup page to commit your change.




*Screenshot 326: Select Ask a question*

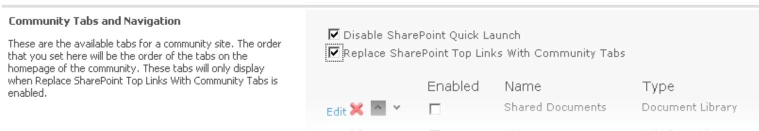
Having done this, the community's post control should now look like this, with the question option on the left:


*Screenshot 327: Community's post control*

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

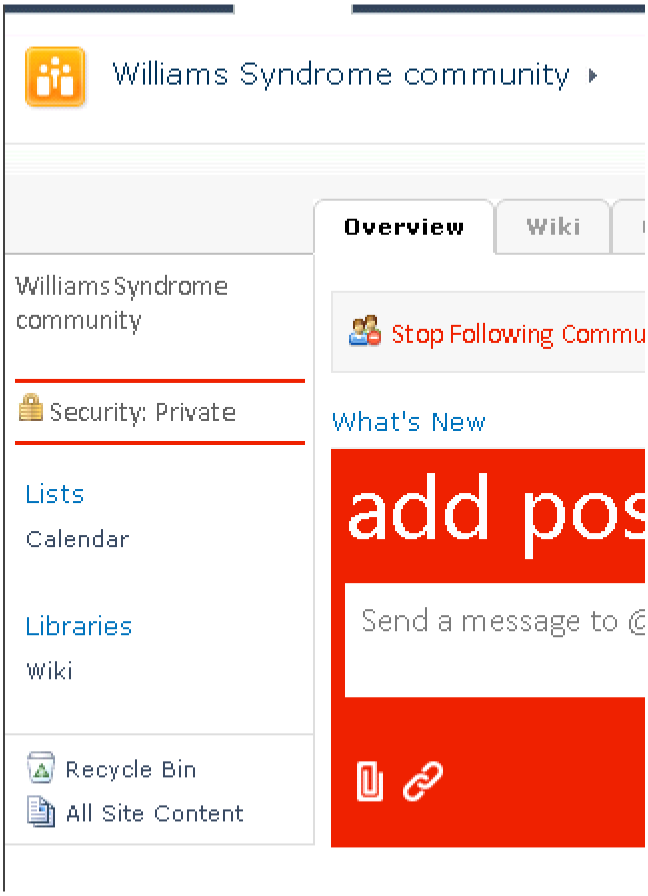
## Disable SharePoint Quick Launch

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.

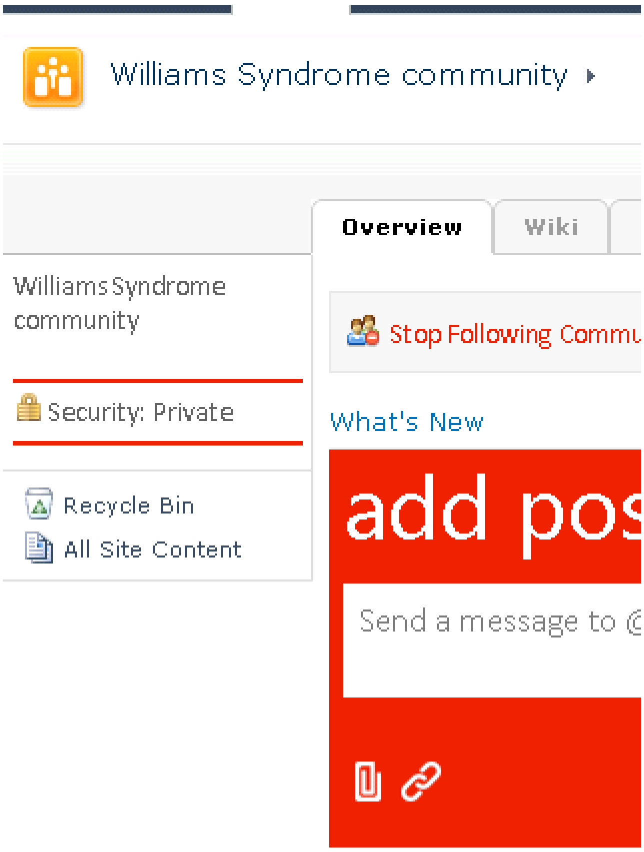



*Screenshot 328: Community Tabs and Navigation*

Below pictures shows what the community looks like when these are not suppressed and when **Disable SharePoint Quick Launch** is checked.



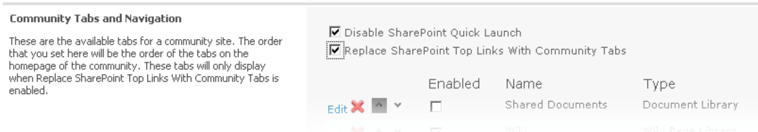

*Screenshot 329:* ***Disable SharePoint Quick Launch*** *is not checked.*




*Screenshot 330:* ***Disable SharePoint Quick Launch*** *is checked.*

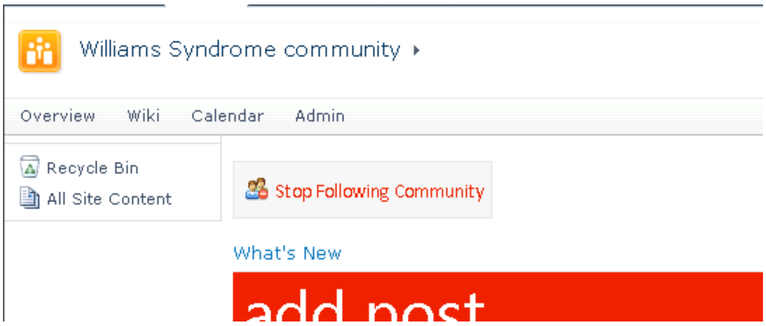
## "Tab" Navigation Using SharePoint Master Page

As part of the work to make Aurea Social work well for both SharePoint 2010 and SharePoint 2013, Aurea 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 Aurea Social master page.

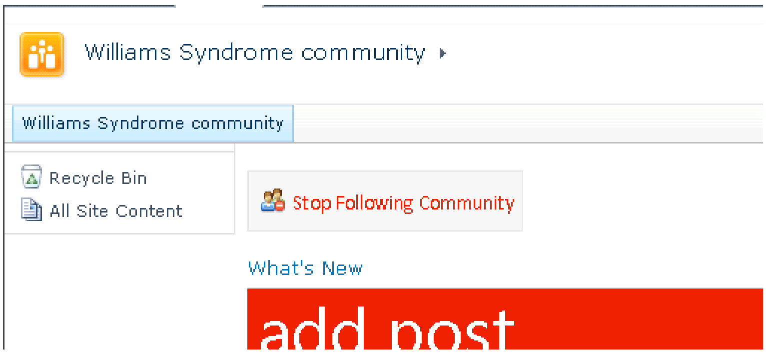



*Screenshot 331: Enable Replace SharePoint Top Links With Community Tabs*

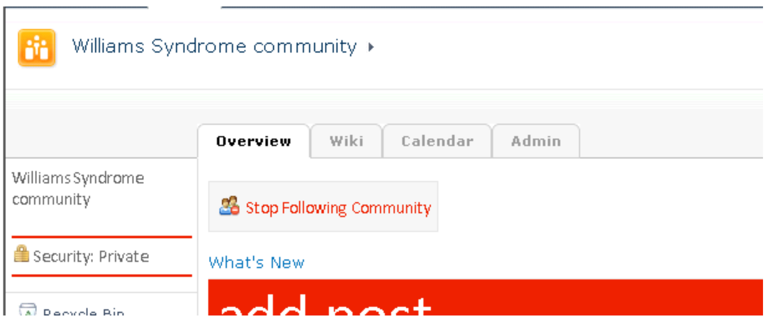
With **Replace SharePoint Top Links With Community Tabs** checked and the SharePoint master page in use, you'll see links to the different pages in the community site in the upper SharePoint navigation:




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

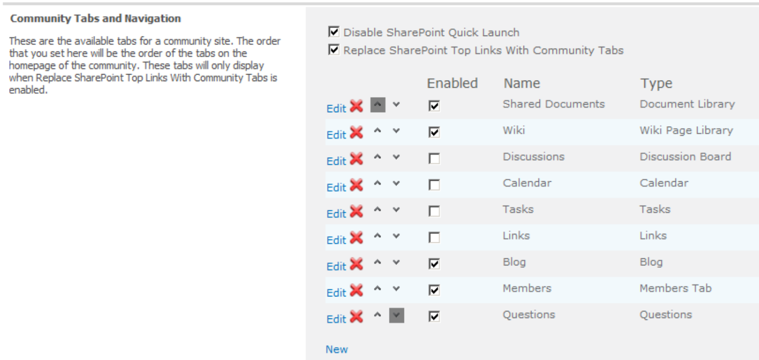



To see the regular Aurea Social community tabs, you must have the master page set to **Community Master Page** and also **Replace SharePoint Top Links With Community Tabs** must be checked.




*Screenshot 332: Regular Aurea Social community tabs*

## Community Tabs enablement and positioning




*Screenshot 333: Community Tabs enablement and positioning*

Checking an **Enabled** box next to any tab in the **Community Tabs** and Navigation section means that tab is included in your community. The typical tab corresponds to a single list or library in the community.

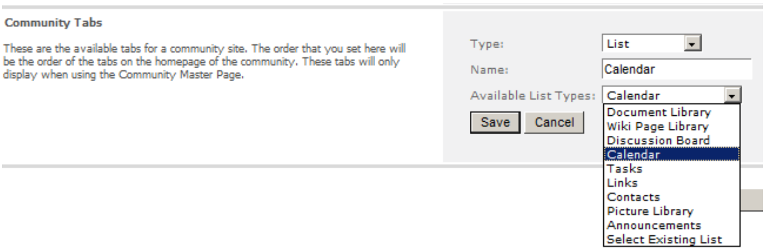
The up and down arrow controls only apply if the Community Master Page has been selected. Tabs appear in the order chosen here.

If something other than the Community Master Page has been selected, checking the **Enabled** box next to a tab results only in the corresponding list or library being created (no tab results).

The exceptions are the **Members and Questions** tabs, which are custom Aurea Social tab types that do not 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:

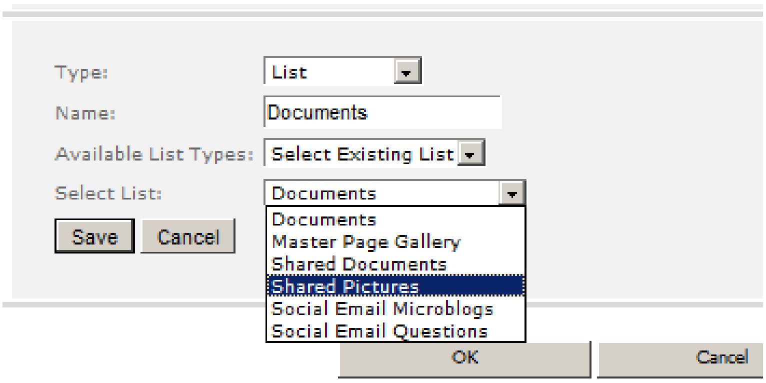



*Screenshot 334: Community Tabs*

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

**List** - 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 is 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 displays the new list.

If you choose **Select Existing List**, another dropdown appears, displaying only those lists that already exist in the community.




*Screenshot 335: The tab displays the list you select here.*

**Link** - With this selected, you are prompted for an URL. Clicking the resulting tab redirects your browser to whichever URL you provide here.

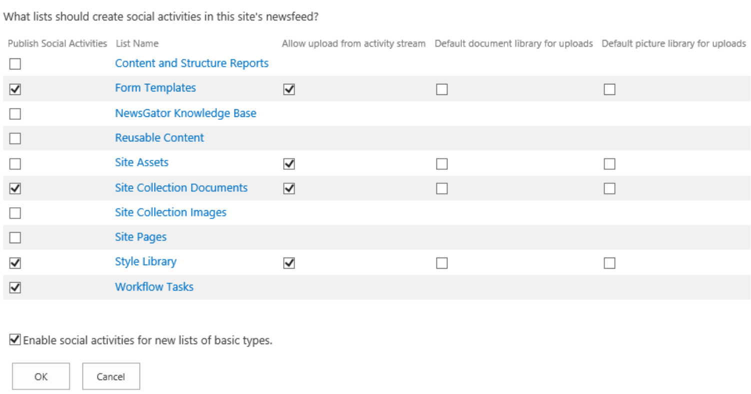
**Member** - With this selected, the resulting tab is a community members tab (see Using and administering your new community, below, for more on this tab type).

**Questions** - With this selected, the resulting tab has 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:

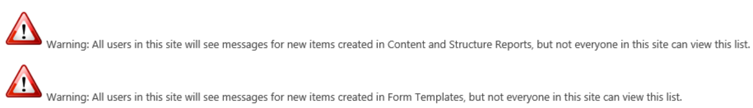



*Screenshot 336: Receivers section of the community's Setup page*

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 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.

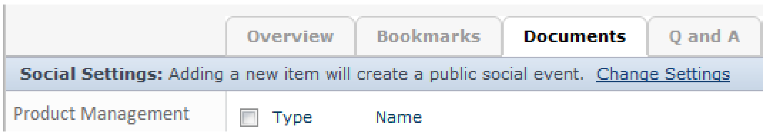


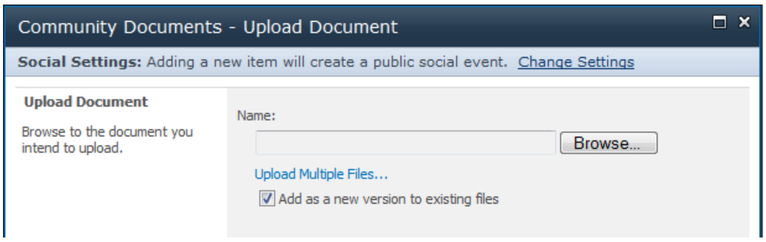

*Screenshot 337: Warning message*

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 bypasses this security check.

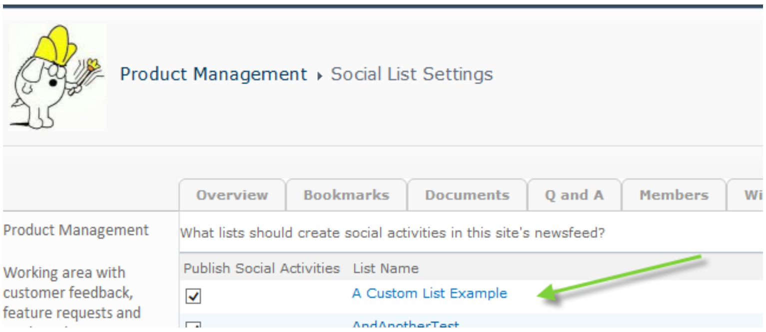
A status message on the list itself lets site owners know that events will not be created from the list:




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:

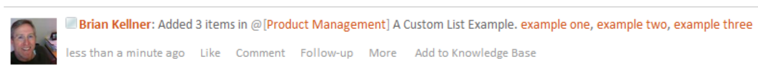



*Screenshot 338: Custom list in the Social List Settings*

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:




*Screenshot 339: 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 is automatically made to follow to the community. Users may subsequently choose to unfollow the community, and that decision is respected even though the user remains in the default members group.

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

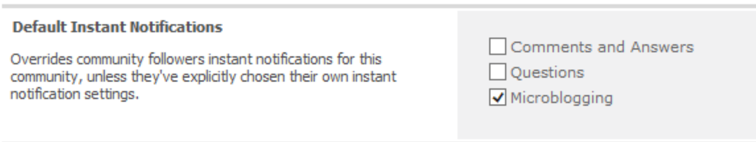
If an audience is also being used to manage followers (see the Setting Community Followers Using SharePoint Audiences section), the user who has not chosen on their own whether to follow or unfollow remains a follower so long as they are in either one of the default members group or the audience. They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

> **Note:**
> 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 no longer receive the notifications.

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

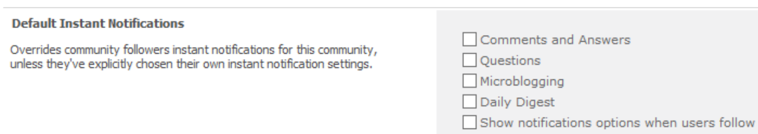



*Screenshot 340: Default Instant Notification*

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.

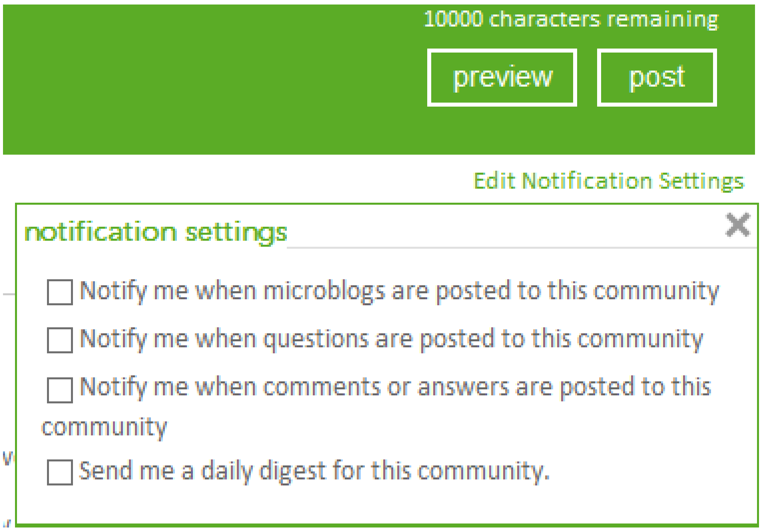
When this functionality is turned on, existing users have the setting updated when the community processor job runs (typically hourly). New users has the notification setting applied immediately.

> **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.




*Screenshot 341: These checkboxes turn on a different kind of notification email for each user who follows this 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.




*Screenshot 342: These checkboxes causes the notifications options to display below the post box when a user follows the community*

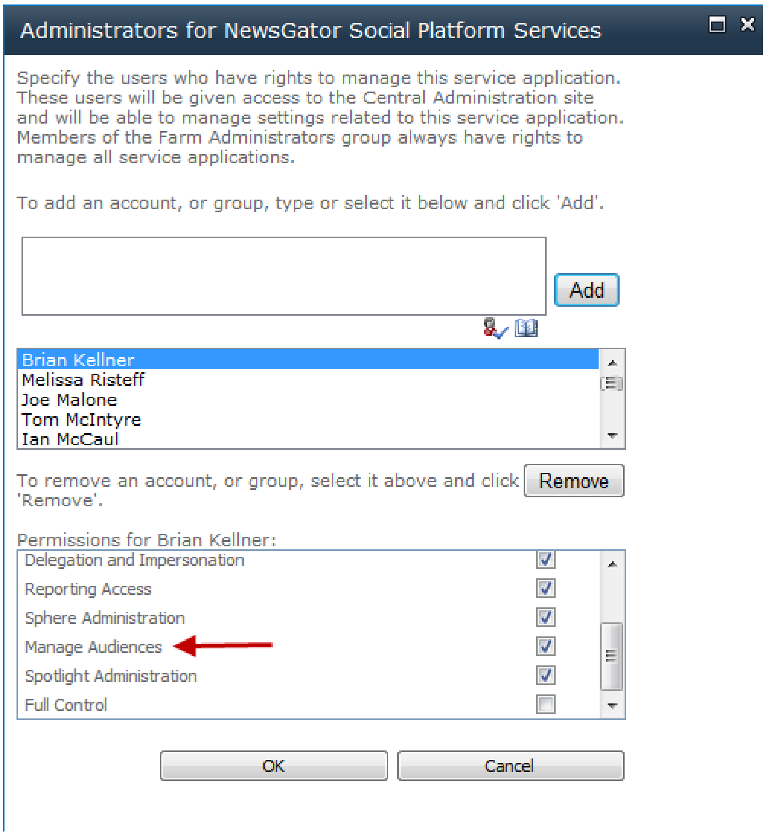
## Setting Community Followers Using SharePoint Audiences

Frequently, companies want to set the followers of a community based on some other group defined in the company. Often this is 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 Aurea Social can use audiences to set and maintain the followers of a community.

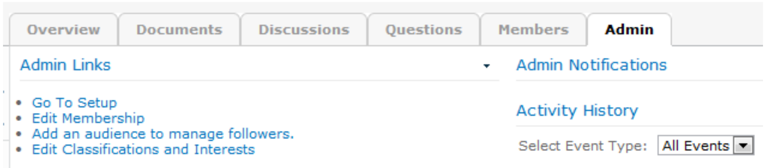
Some common uses for this feature are making communities that map to departments or adding all company members to a community.

The ability to use this feature is tied to **Manage Audiences** permission on the NewsGator Social Platform Service in Central Admin (see screenshot below):



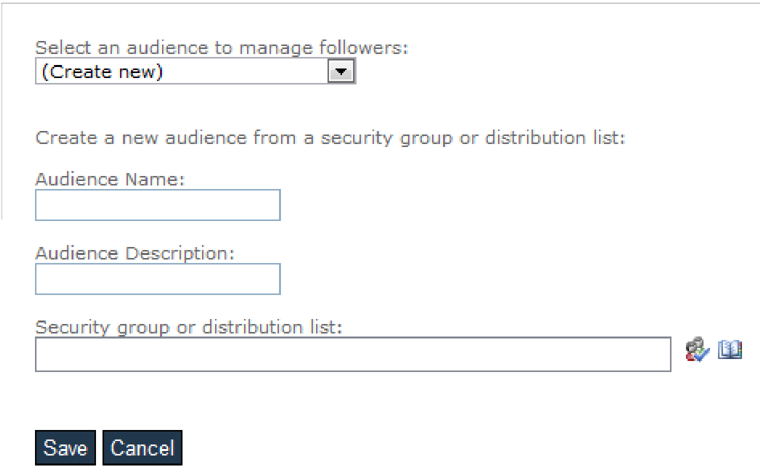

*Screenshot 343: Manage Audiences permission*

Community owners with **Manage Audiences** permission can see the link to enable this capability is located on the **Admin** tab.




*Screenshot 344: Click Add an audience to manage followers*

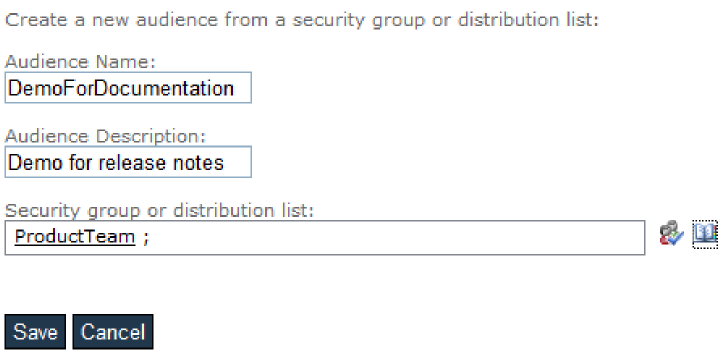
1. Click **Add an audience to manage followers** to open control to manage audience.




*Screenshot 345: Click **Add an audience to manage followers***

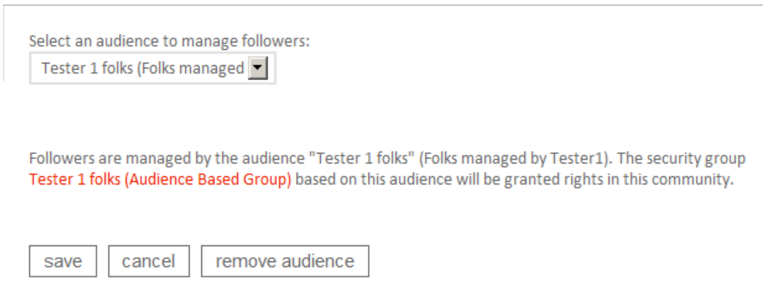
2. Chose an existing audience(if already been defined) from **Select an audience to manage followers:**.

If you set it at **Create new**, you can define the audience by giving it a name, a description, and then selecting a security group or distribution list.




*Screenshot 346: Define audience*

3. Click **Save** to create the audience and apply it to the community.




*Screenshot 347: Click Save*

Members of the audience are 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).

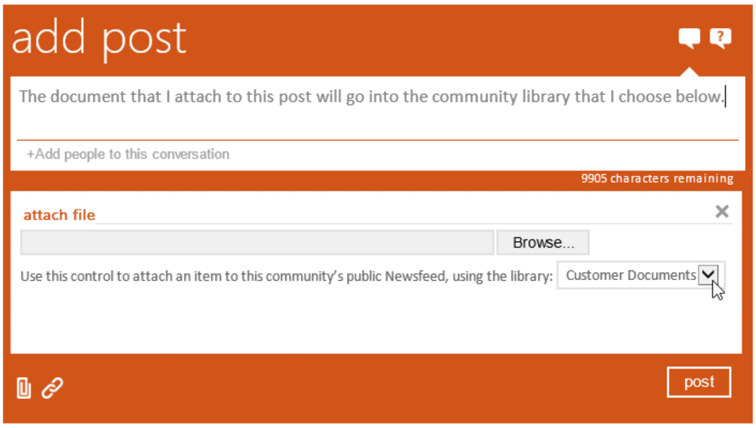
On an ongoing basis, SharePoint re-compiles the audience to reflect changes in the distribution list (or AD group or profile properties).

The NewsGator Audience Processor job checks 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 holds 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.

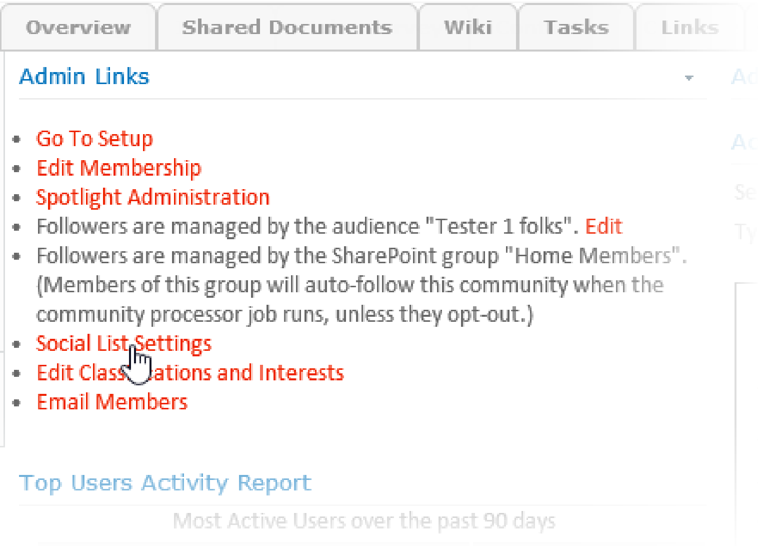



*Screenshot 348: Customer Document dropbox*

Not all users can 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.

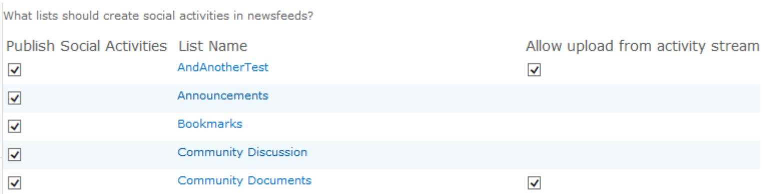
Additionally, community admins may choose to prevent some libraries from appearing in this list to anyone at all. They do this by clicking the **Social List Settings** link on the **Admin** tab of their community.

You can go to the **Admin** tab by clicking the **Community Administration** link on the community's site settings page.




*Screenshot 349: Click Social List Settings*

The page that appears shows all the lists in the community, libraries and non-libraries alike. Only libraries, however, has checkboxes providing the option to **Allow upload from activity stream**. These are all checked by default.



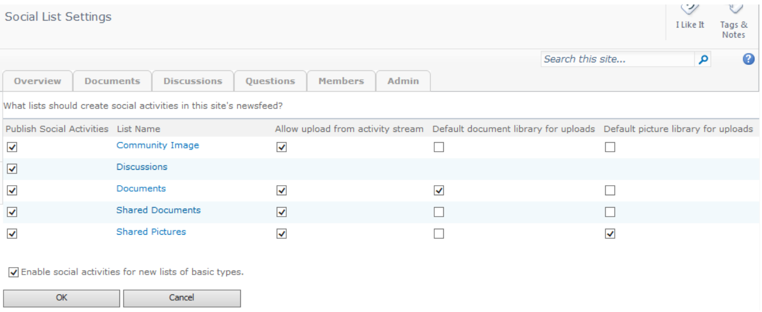

*Screenshot 350: Unchecking any library causes that library to no longer appear as an option in the dropdown for selecting where an attachment is stored*

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 changes 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 shows in the drop down.




*Screenshot 351: Social List Settings*

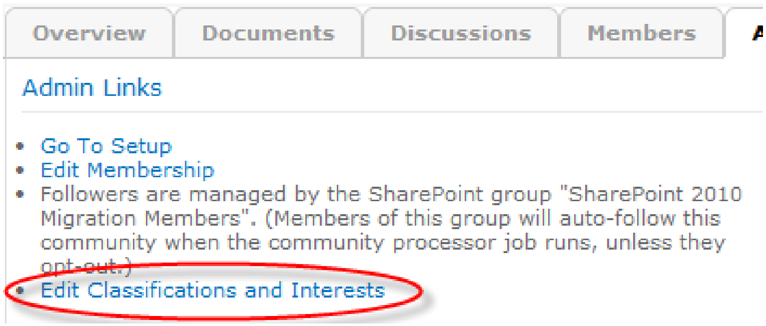
## Community Interests

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 can have on the activity stream view in the community.

In the community **Admin** tab, click the **Edit Classifications and Interests** link:



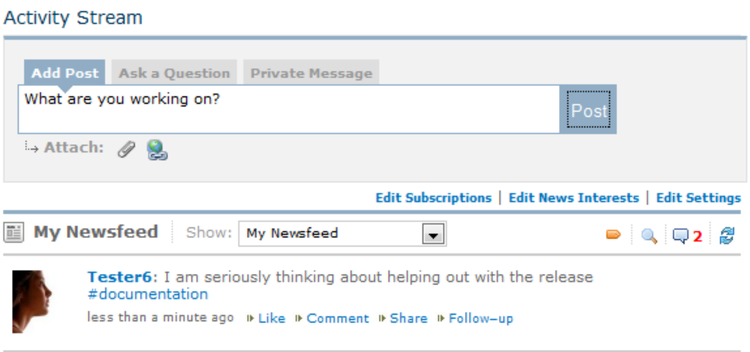

*Screenshot 352: Click **Edit Classifications and Interests***

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


*Screenshot 353: Type documentation and click **Save***

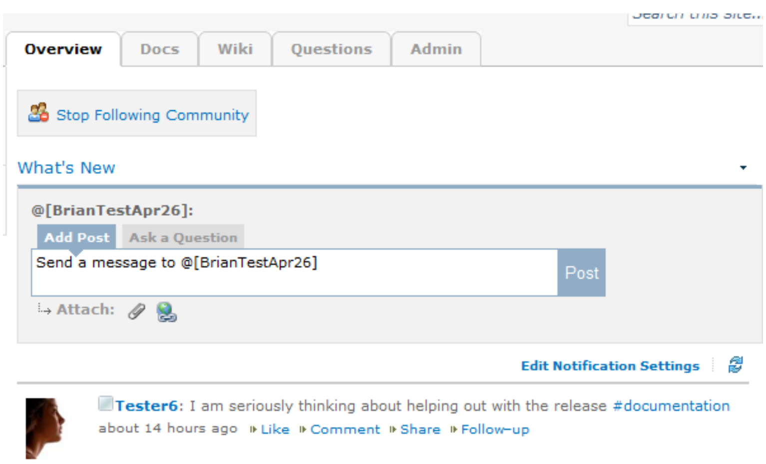
Notice in the pictured example, an auto complete option is provided for the tag "documentation", as this tag is already in the system.

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




*Screenshot 354: Post from a user who is not a part of the community*

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



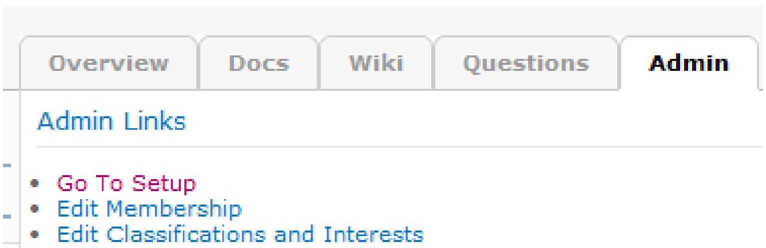

*Screenshot 355: Post from a user who is not a part of the community is displayed*

## Community Classification

Communities can be classified by applying categorization tags to them.

To do this, follow the below steps:

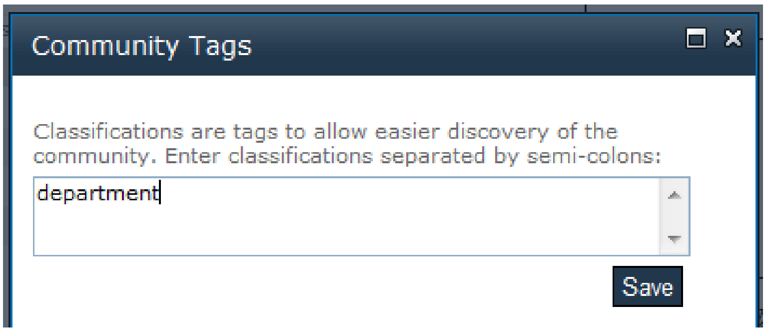
In the community **Admin** tab, click the **Edit Classifications** and Interests link.




*Screenshot 356: Click **Go To Setup***

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

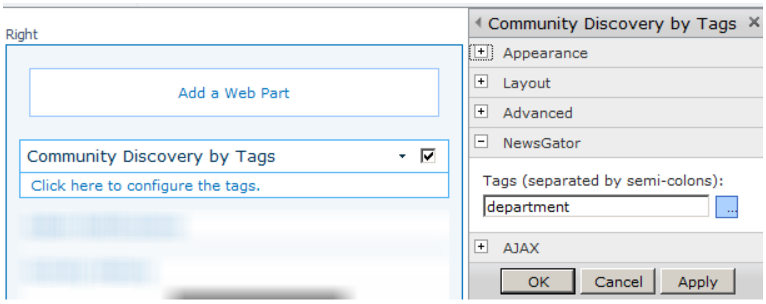
Click **Save**.




*Screenshot 357: Click Save*

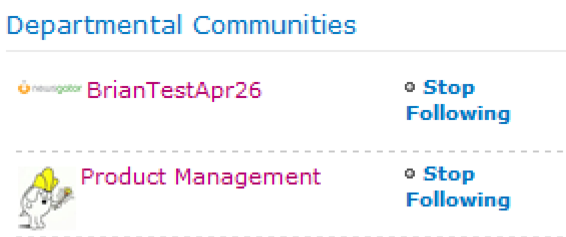
Communities sharing the same or related tags can then be displayed together by deploying the Community Discovery by Tags web part (available under the Newsgator Social web part grouping) and configuring it to list communities of only a particular category, or matching one of a list of categories.

Shown here is how to configure the web part to list only communities categorized with "department":




*Screenshot 358: Configuring 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**.




*Screenshot 359: 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. Aurea 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.

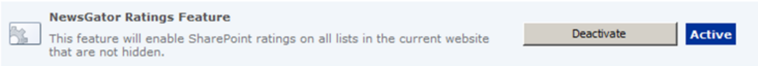
If this event is not bound, it simply moves on as if it's not there.

## 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

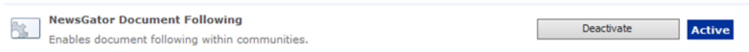
The **NewsGator Ratings Feature** enables ratings on all non-hidden lists within the community (versus going to each list and enabling them individually).




*Screenshot 360: NewsGator Ratings Feature*

### 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.



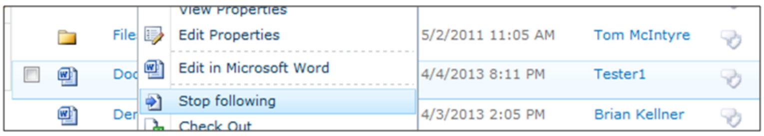

*Screenshot 361: NewsGator Document Following*

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 Aurea Social can display in the activity stream.

For SharePoint 2010, Aurea 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.

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 Aurea Social can display in the activity stream.

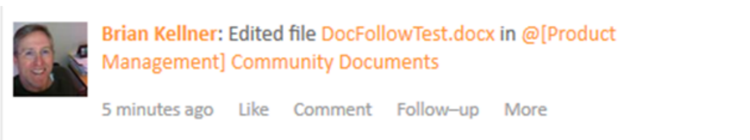
For SharePoint 2010, Aurea Social includes a feature to let users do the same thing. To take advantage of this, users select the “Follow Document” option from actions menu for the document, when viewed in the document library. Users can come back at any time to stop following the document from the same control.




*Screenshot 362: Select a document to follow*

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.

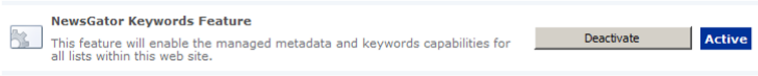
By contrast, edits on documents in communities the user follows shows in their activity stream, but without producing a notification.




*Screenshot 363: Followed documents*

### Adding tag and note/comment display on community lists

The **NewsGator Keywords Feature** adds a **Tags and Notes** column on the standard tabular list view of non-hidden lists within the community (for Documents, Wikis, Tasks, etc.).




*Screenshot 364: NewsGator Keywords Feature*


*Screenshot 365: Click on Tag and note*

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.

Alternatively, you can 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.

For further details, 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.


*Screenshot 366: NewsGator community Context*

## Blog "Ghostwriting"

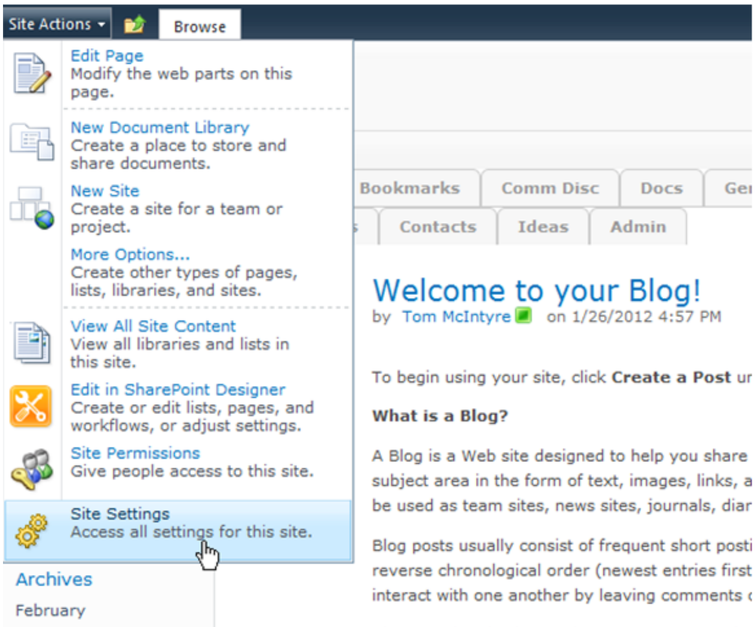
In many organizations, a leader may have another person draft a blog post. The leader then reviews, edits (if necessary) and approves the blog post. The point of this exercise is to let an organizational leader express views and let users within the organization respond to those views. The "ghostwriter"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

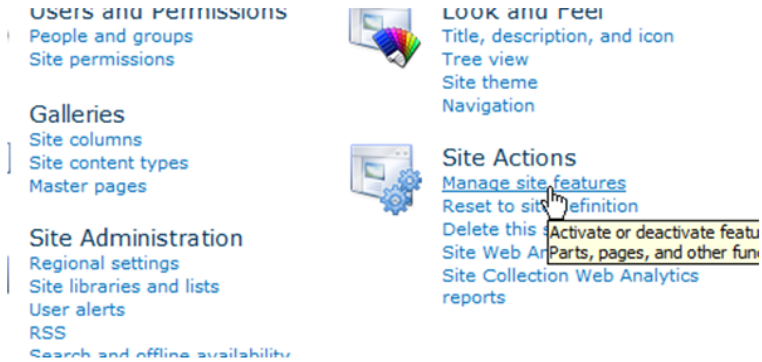

*Screenshot 367: Click **Blog** tab*

2. On the blog tab, go to **Site Actions** > **Site Settings**.



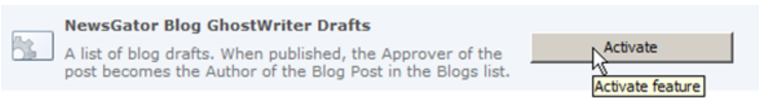

*Screenshot 368: Navigate to Site Settings*

3. Click **Manage site** features on the settings page.



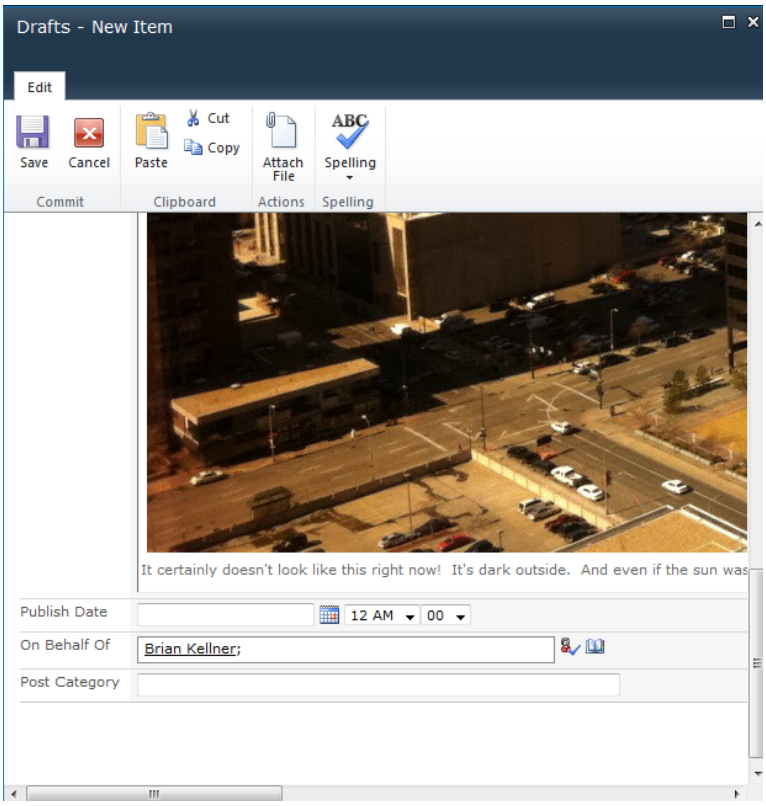

*Screenshot 369: Click Manage site*

4. Click the **Activate** button by the **NewsGator Blog GhostWriter Drafts** feature.



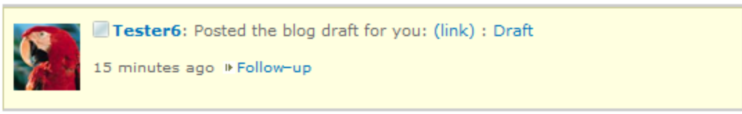

*Screenshot 370: Click **Activate***

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.

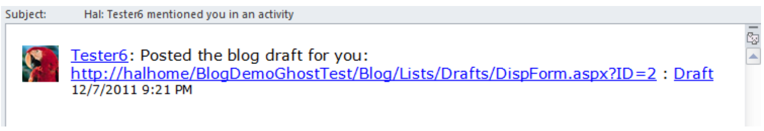



*Screenshot 371: Specify the **On Behalf Of** field*

A notification email and a stream event are sent to whomever is specified in the "on behalf of" field.



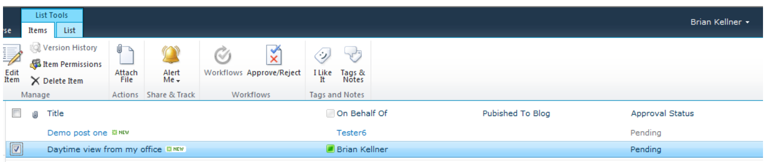

*Screenshot 372: Notification that the draft is posted on behalf of the specified person*




*Screenshot 373: Email received on behalf of the one specified*

> **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.




*Screenshot 374: Select the post and click **Approve/Reject***

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.

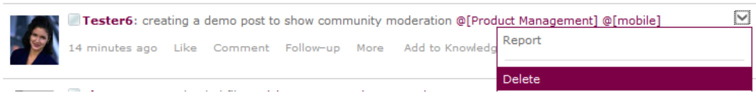
## 1.36.5 Moderating a Community

#### Removing Items from a Community's Stream

A community owner can choose to hide an activity stream item that is displaying in her community. Aurea 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.




*Screenshot 375: Deleting a post*

#### Pinning Items to the Top of a Community's Stream

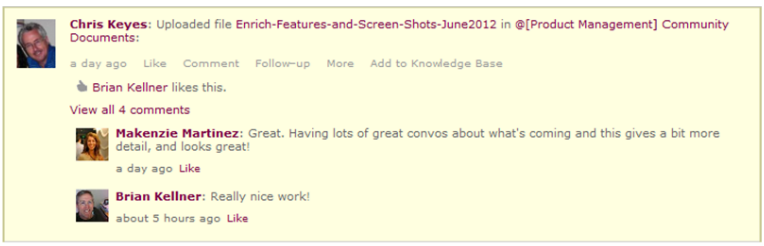
A community owner can choose to pin one or more activity stream items to the top of the community stream.

This can be done from the "more" menu on the activity stream item. Only community owners (and moderators starting in version 5.3) can 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 appears in that other community's stream and thus will not be available to pin.


*Screenshot 376: Pinning a post*

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.




*Screenshot 377: The item will stay pinned to the top of the stream until it is "unpinned" from the "more" menu*


*Screenshot 378: Unpinning a post*

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.

### 1.36.6 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 questioner. After a question receives a response and then a configurable length of time goes by, the person who asked the question receives 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.

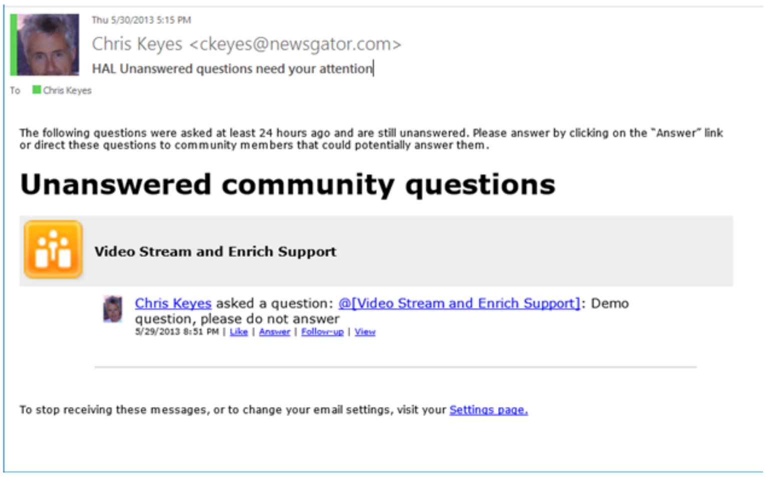
Curators, experts, and questioners all can mark an answer as good. This helps to ensure answers get "closed out" with a good answer.

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 |

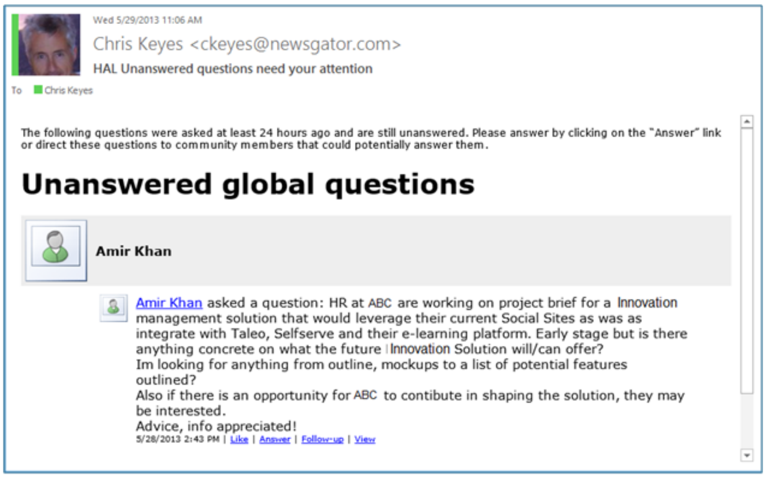
**Examples**

Here is a sample unanswered questions digest that a community curator would receive:



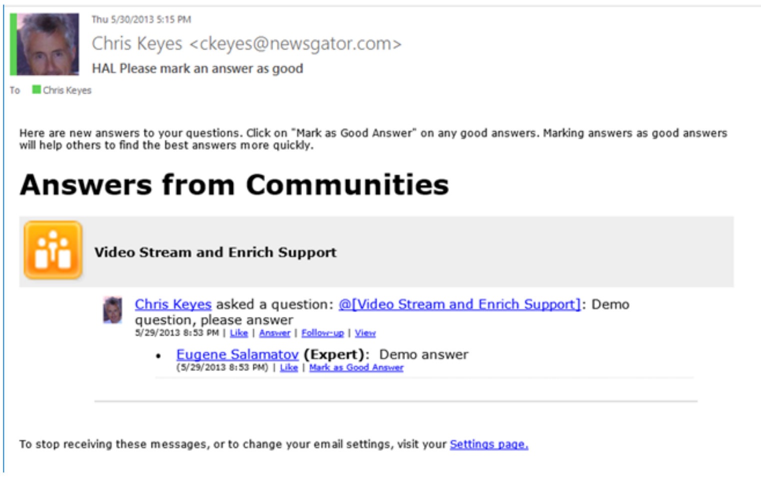

*Screenshot 379: Sample unanswered questions digest for a community curator*

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



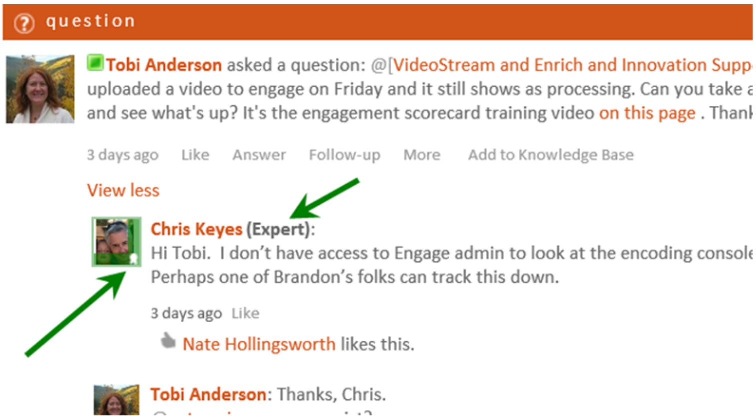

*Screenshot 380: Sample unanswered questions digest for a global curator*

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



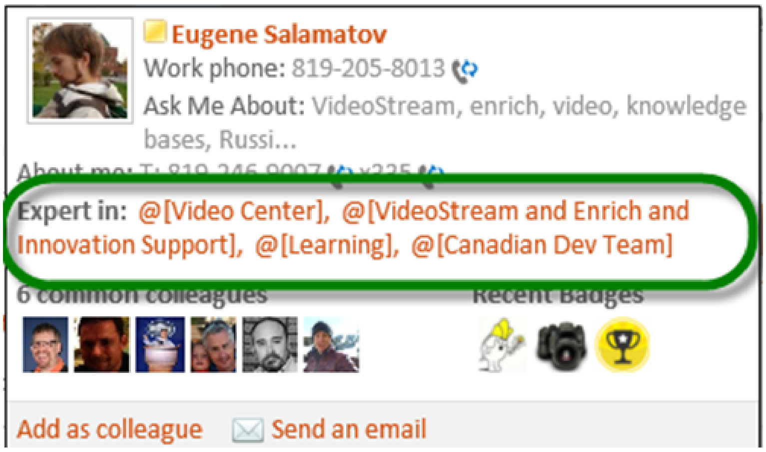

*Screenshot 381: Sample email to a questioners prompting them to mark answers as good answers*

When a community expert answers a question (or adds a comment), the expert label is visible on their avatar. The text **Expert** also appears just after their name.




*Screenshot 382: Community expert answers the question*

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

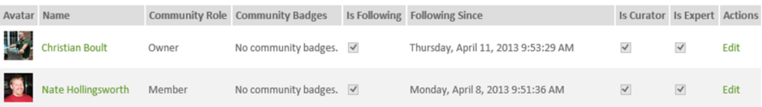



*Screenshot 383: Profile mini-card*

## Granting Curator and Expert Roles

Community owner can grant Community curator and expert roles from the Members tab in communities.

To grant these rights the corresponding check boxes should be enabled. These can be enabled only after clicking the **Edit** link



| 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 |

*Screenshot 384: Click **Edit** to grant curator and expert roles*

You can specify Global curators in **Central Administration** > **Service Applications** > **NewsGator Social Platform** > **Manage Global Q&A Curators**.

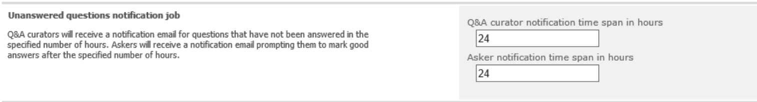
For further details, see the Manage Global Q&A Curators section.


*Screenshot 385: Global Q&A Curators section*

### 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. For further details, see Configure Job Settings.




*Screenshot 386: Unanswered question notification job*

### Opting out of reminder emails

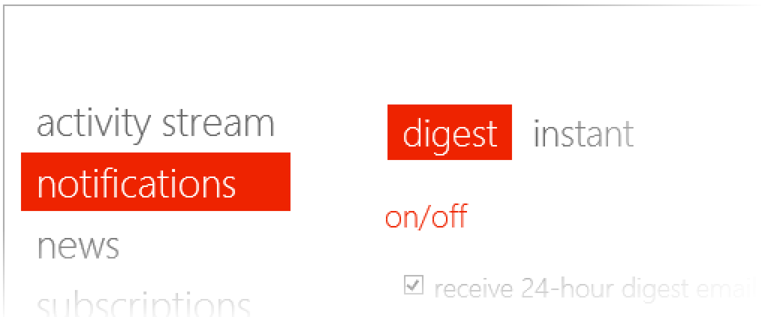
Individual users can opt out of receiving these email notification messages.

The options are found in their **Settings** dialog. To out, do the following:

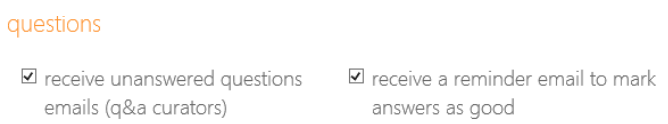
1. Go to the notifications tab within this dialog.

2. Click **digest**.

The first option is only visible for users who are curators in at least one community.




*Screenshot 387: Click digest*



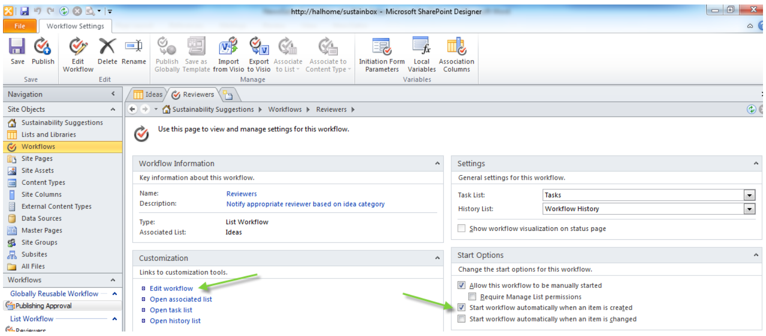

*Screenshot 388: Enable checkboxes*

## 1.36.7 SharePoint Workflow Integration

To make it easier to interact with Aurea 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 are sending a message in the activity stream to a reviewer based on an attribute of a list item when it is created.

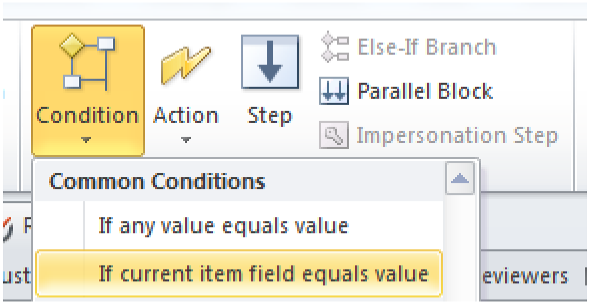


*Screenshot 389: Sending a message in the activity stream to a reviewer*

This specific use case is to notify a person of a new suggestion (part of the Innovation Solution functionality) that needs to be reviewed.

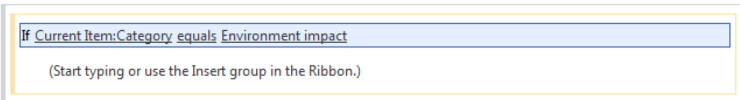
Each suggestion idea has a **Category** field, so depending on the value the user picks when they create the idea, we want to send a different reviewer a notification.

Setting up the condition part of the workflow is no different than any other SharePoint workflow.

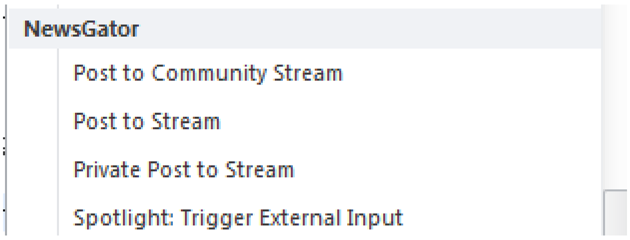



*Screenshot 390: Setting up conditions*

So in this case, we're picking ideas about environmental impact.

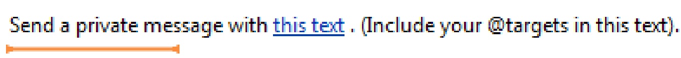



When we go to select actions, we can see a new set of NewsGator options.



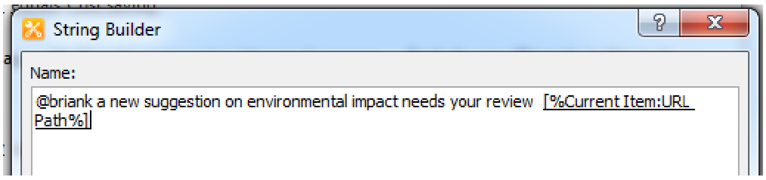

*Screenshot 391: New set of NewsGator options*

If you select the **private post to stream** option, it looks like this.




*Screenshot 392: Selecting the **private post to stream** option*

Click on **this text** to specify simple text or use the string builder to put together the whole message.




*Screenshot 393: Click on **this text** to specify simple text*

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.


*Screenshot 394: Private message*

> **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.

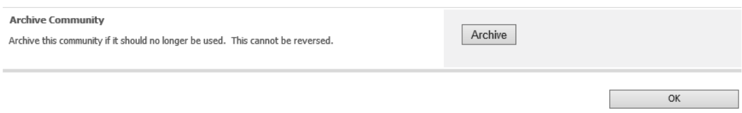
As of the 5.3 release, all communities now have the "Archive" control available from the Setup page.

### 1.36.8 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.

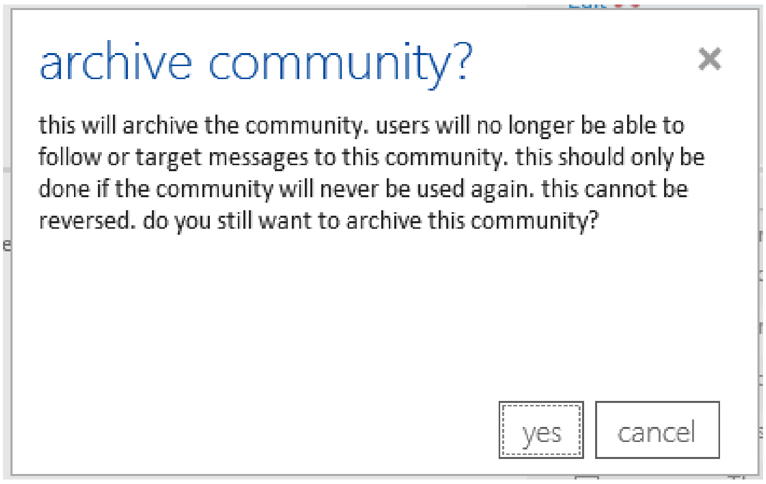
This feature does not change the SharePoint site related to the community. If your standard process includes deleting the site or modifying the lists and libraries, you can still perform those steps manually.

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




*Screenshot 395: Click **Archive***

1. Click the "**Archive**" button. A confirmation dialog is displayed.




2. Click **Yes** to confirm or **Cancel** to deny.

Confirming this dialog causes the following:

» 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

## 1.37 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.

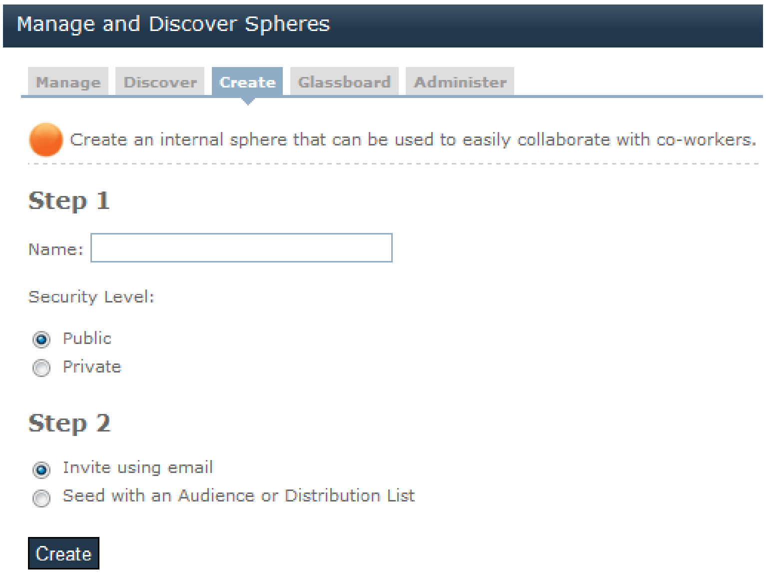
#### Transferring Sphere Ownership

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.

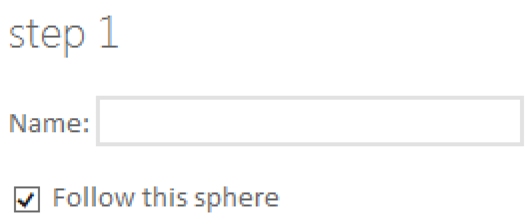
The creation flow for spheres has been changed slightly. The first step is to choose a public or a private sphere.



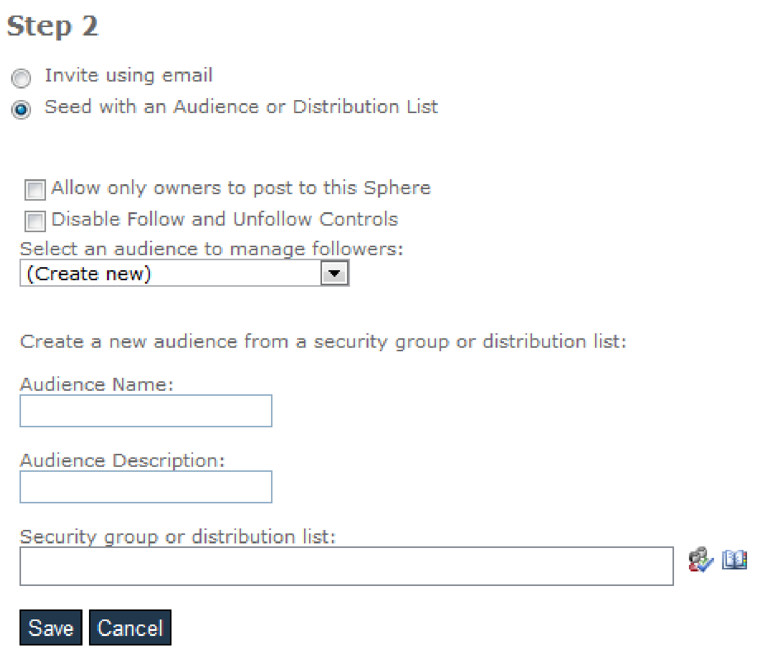

*Screenshot 396: Set the fields on* ***Create*** *tab*

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.



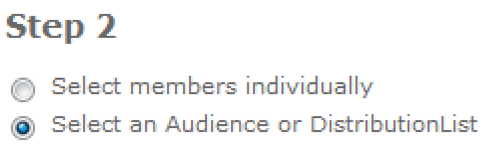

*Screenshot 397: Step 1*



Step 2

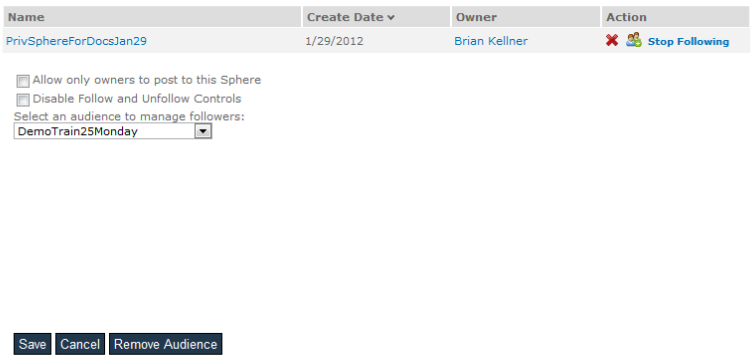
> **Note:**
> The other community options (read only and disable follow/unfollow) are also shown here. These choices work the same as described above for communities.
> They can be adjusted after the sphere is created from the manage options for the sphere. In all other respects, the process for selecting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




*Screenshot 398: Step 2 if private sphere is selected*

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




*Screenshot 399: Options displayed on clicking provate sphere that uses distribution list*

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.

## 1.38 LookoutPage

Below are the topics for Lookout page:

### 1.38.1 Enabling the Lookout Page

The Lookout page can only be deployed within the **My Site**. This is so that other features within Aurea Social knows where to find the Lookout page.

To deploy, do the following:

1. Go to the site collection features page of your **My Site** site collection.

2. Click **Activate**. This adds the Lookout page.

Deactivating this feature deletes the Lookout page from the **My Site** site collection.

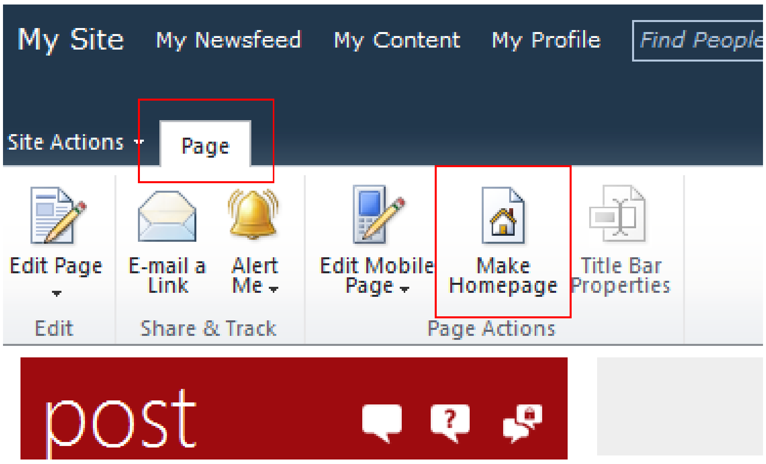

*Screenshot 400: Click **Activate** to add the feature and **Deactivate** to remove*

## 1.38.2 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**, do the following:

1. Browse to the **Lookout** page (`http://{MYSITE}/Lookout.aspx`).
2. On the Page ribbon, select **Make Homepage**.




*Screenshot 401: Click **Make Homepage***

## 1.38.3 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.

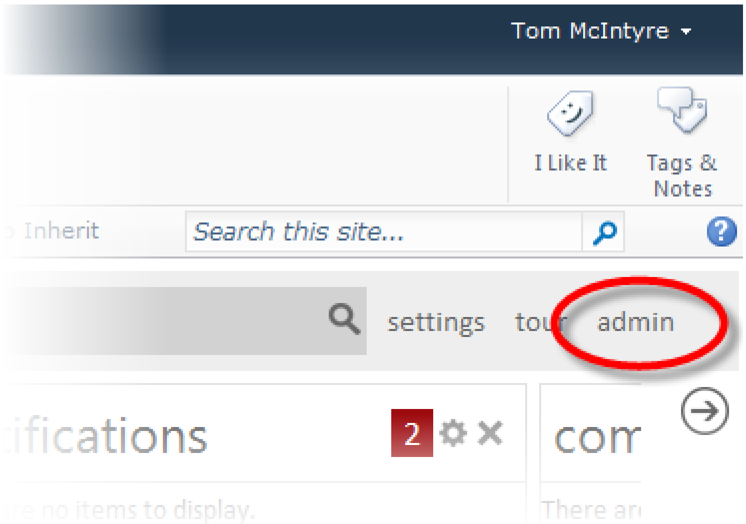
Tile Sets are defined by audience (SharePoint audiences may, in turn, be defined based on email distribution lists, active directory security groups, or SharePoint user profile properties). One tile set may be applied to each audience.

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 see an **admin** link on the Lookout page:



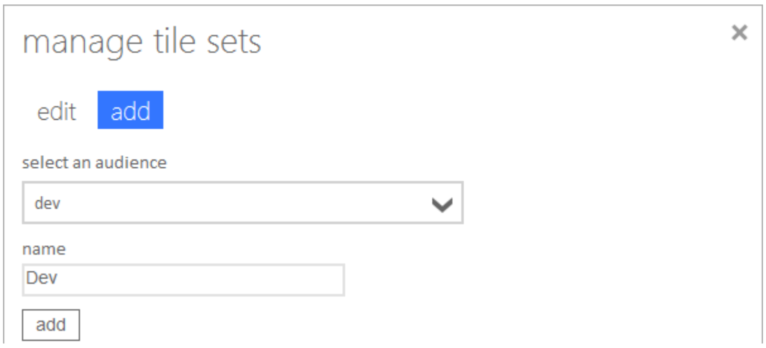

*Screenshot 402:* ***admin*** *link on Lookout page*

Clicking this link displays a dialog with the option to add or edit a tile set.

To begin creating a new tile set, do the following:

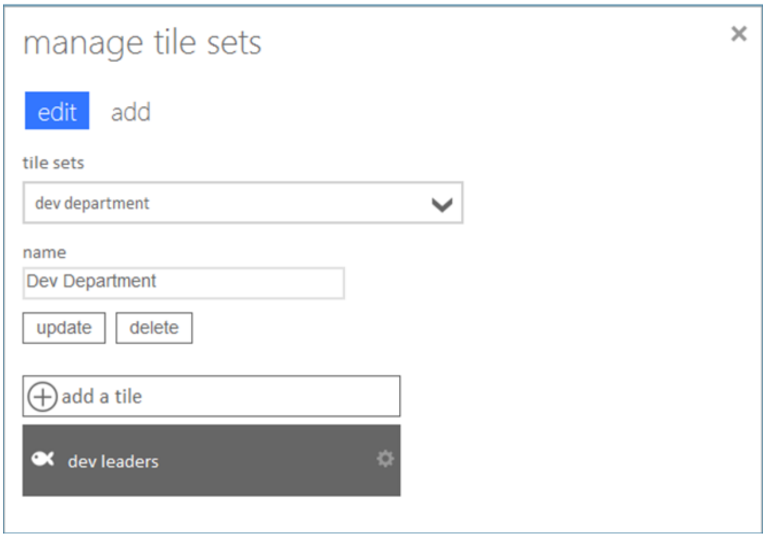
1. Click **add** in the navigation control at the top of this dialog. This allows selecting the related SharePoint audience and picking a title for the tile set (which defaults to the audience name).

2. 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.



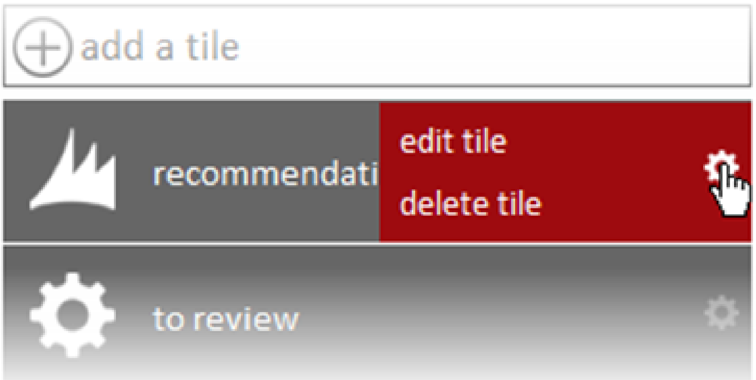

*Screenshot 403: Click add*

Editing a tile set allows selecting the tiles that is 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**.




*Screenshot 404: Click edit*

Tiles are 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).



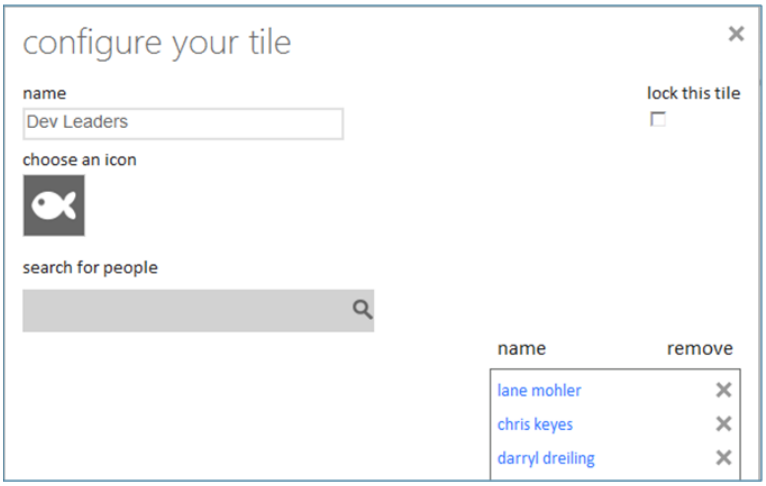

*Screenshot 405: Click gear icon*

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 are automatically added to the subscription tile.



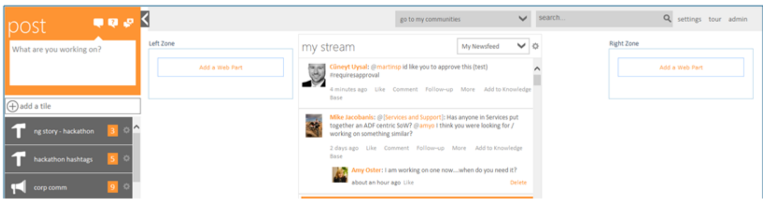

*Screenshot 406: configure your title*

> **Note:**
> In later releases, the word "tile" was changed to "stream" based on usability testing.

## 1.38.4 Web Parts on Lookout

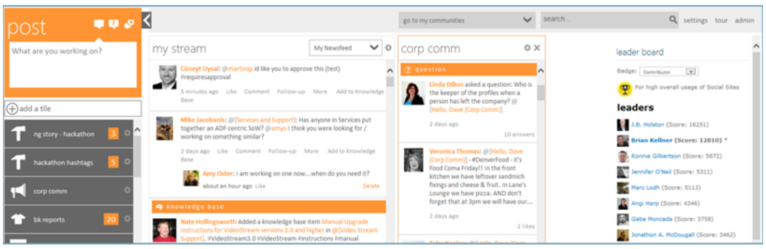
In some companies, there is a need to ensure certain information is always visible.

To meet this need, in all versions since 4.0 of Aurea 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).




*Screenshot 407: Lookout page supports adding web parts*

Below is an example with the Spotlight Leaderboard web part added in the right zone.




*Screenshot 408: An example with the Spotlight Leaderboard web part*

## 1.38.5 Lookout Mobile Web

Lookout Mobile Web provides many of the same features as the main Lookout Page in Aurea Social. The main goals are to let users view and respond to stream items as well as posting microblogs, questions and private messages.

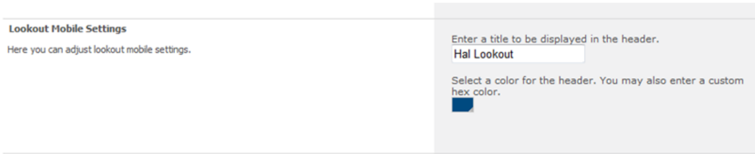
The Lookout Mobile Web interface is an HTML5 solution aimed at those users who are unable to leverage the Aurea Social Sites native mobile apps for whatever reason.

Your Lookout Mobile Web site is bundled with Aurea Social server and can be accessed from a mobile browser at `https://[yourAurea Social instance]/_layouts/mobile/ng/`

### Setting up the Aurea 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 / Aurea Social deployment. For example, at NewsGator, the intranet is named "Hal", so here we use "Hal Lookout" as the title in the mobile browser.




*Screenshot 409: Lookout mobile setting*

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

## 1.39 Integration with Other web pages

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

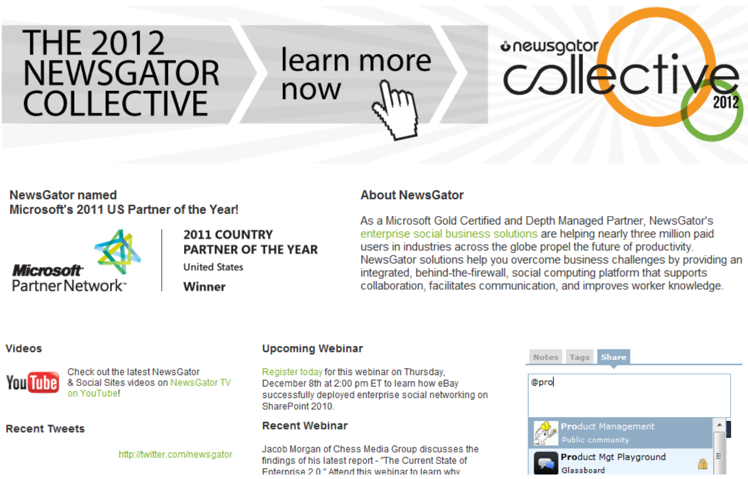
Some organizations want to extend the reach of social features beyond SharePoint. Aurea Social includes a simple way to do this.

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 Aurea Social is installed specified.

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

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

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

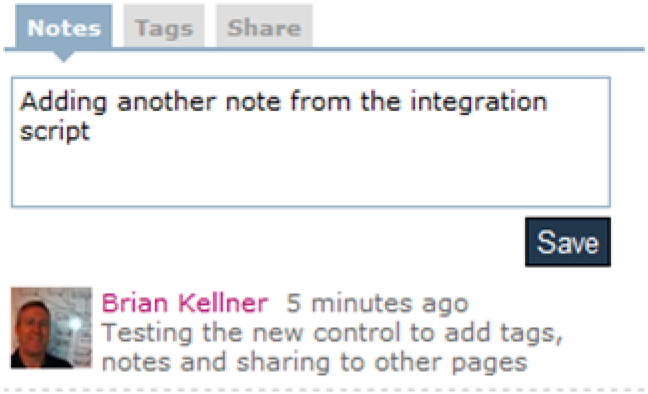



*Screenshot 410: A three-tab control*

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.

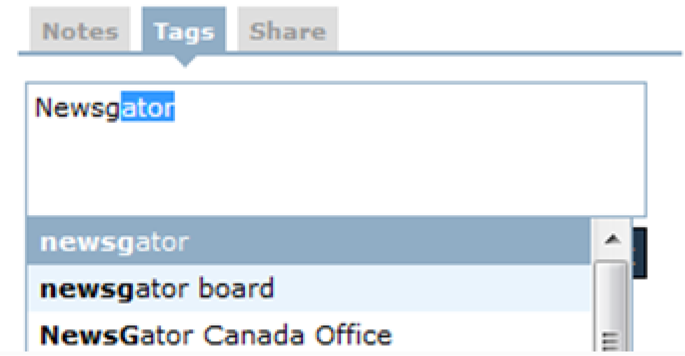
The **Notes and Tags** functionality interact directly with SharePoint in the same way that the built-in browser favorite from the **Tags & Notes** page on the user profile works.

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.




*Screenshot 411: Auto complete tag function*

The tag function auto-completes with suggested tags.




*Screenshot 412: 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:**
> Starting with the 4.5 release, the **Stream Anywhere** 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`

## 1.40 Web part deployment

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 Aurea Social web parts will be available in the gallery by default.

Certain site collection features need to be activated before many Aurea Social web parts is available for deployment on the sites of that site collection. These are detailed out below.

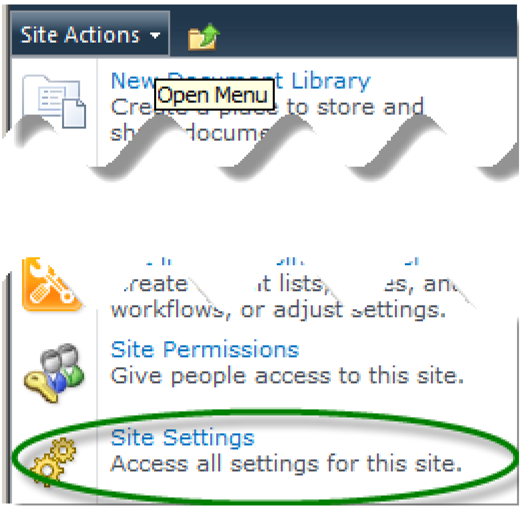
The Pivot Viewer web part also requires a site feature be activated before it will work. There is also an extra configuration step that is required after the web part is deployed.

This is explained below in the Installing the Pivot Viewer Web Part section.

### 1.40.1 Adding Aurea Social web parts to the web part gallery

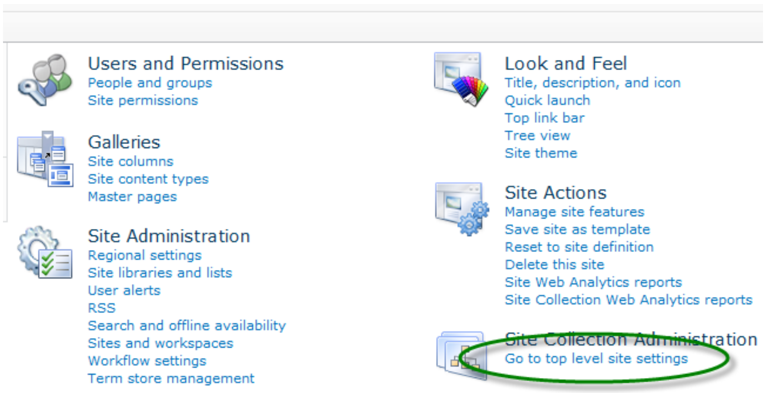
To add all Aurea Social web parts to the web part gallery, you may need to activate up to five site collection features.

1. From any site in your site collections, go to **Site Actions > Sites Settings**. Site Settings page is displayed.



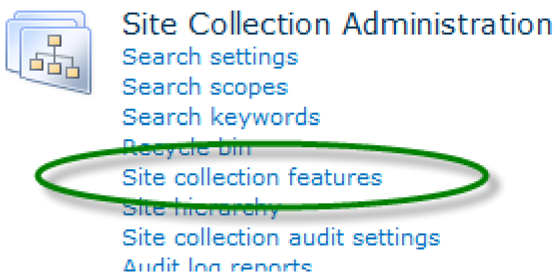

*Screenshot 413: Click Sites Settings*

2. Click **Go to top level site settings**.




*Screenshot 414: Click **Go to top level site settings***

3. Click **Site collection features.**




*Screenshot 415: Click **Site collection features***

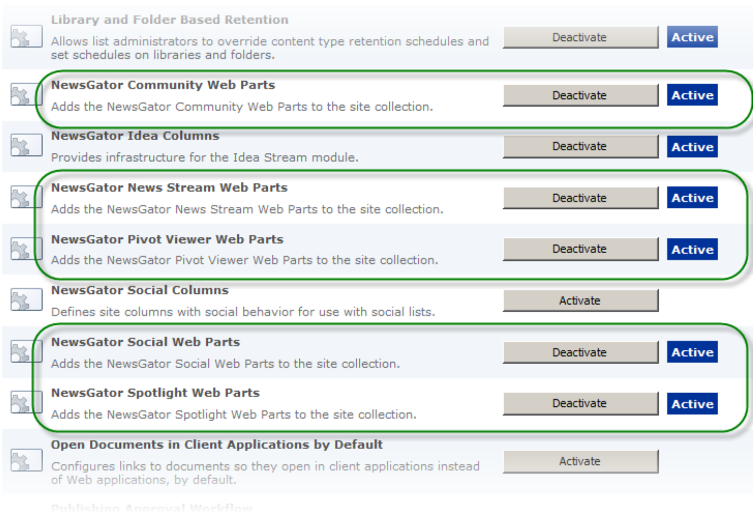
4. Activate the following five features:

» NewsGator Community Web

» Parts NewsGator News Stream Web Parts

» NewsGator Pivot Viewer Web Parts

- NewsGator Social Web Parts
- NewsGator Spotlight Web Parts




*Screenshot 416: Activate the five features*

Below are the web parts that each of these features activates:

NewsGator Pivot ViewerWeb Parts feature

The NewsGator Pivot ViewerWeb 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 |

| Web Part Name | Released in version |
| --- | --- |
| 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 StreamWeb Parts feature

The NewsGator News StreamWeb 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

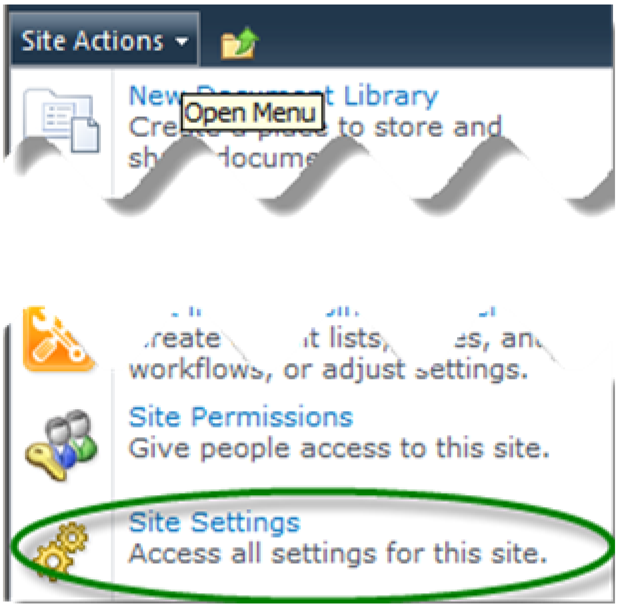
The NewsGator Spotlight Web Parts feature is only available if you have the optional Spotlight module installed. It adds the following web parts to the NewsGator Spotlight Web Parts category in the web part gallery of your site collection:

| 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 |

## 1.40.2 Installing the Pivot Viewer web part

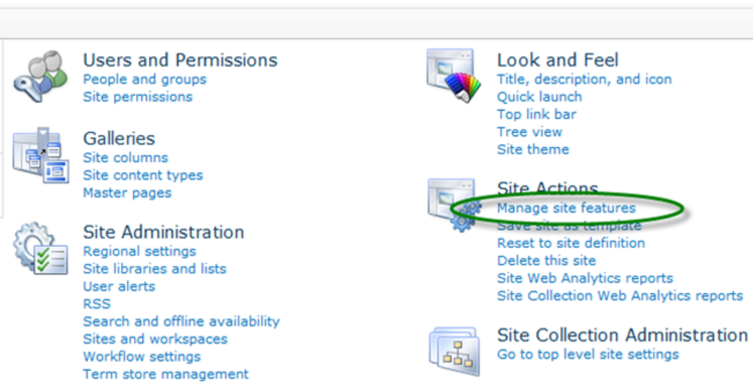
Before deploying a Pivot Viewer web part to the site of your choice, you need to activate a site collection feature. After deployment, some extra configuration may be necessary.

1. From the site on which you want to deploy the Pivot Viewer web part, in the Site Actions menu, click S**ites Settings**. This brings up the **Site Settings** page.



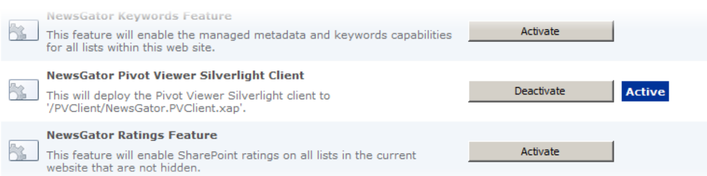

Screenshot 417: Click Site Settings

2. Click **Manage site features**.



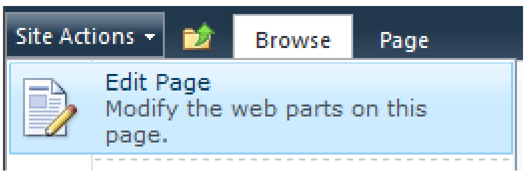

Screenshot 418: Click Manage site features

3. Activate the **NewsGator Pivot Viewer Silverlight Client** feature.




Screenshot 419: Click Activate

4. Return to the site, and edit the page.



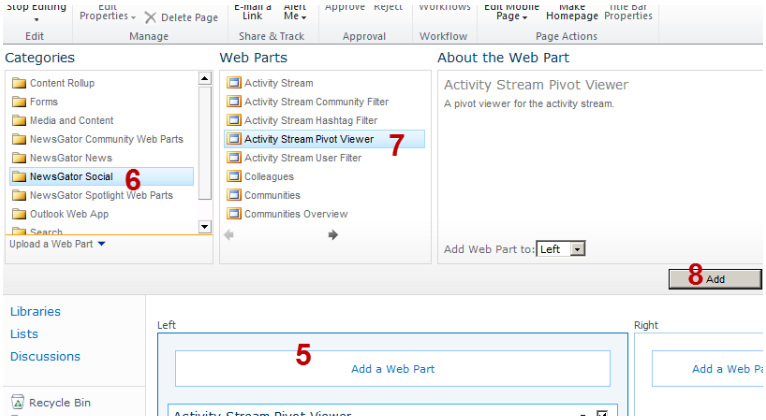

Screenshot 420: Edit page

5. Click **Add a Web Part**.

6. Select the **NewsGator Social** category.

7. Select the **Activity Stream Pivot Viewer** web part.

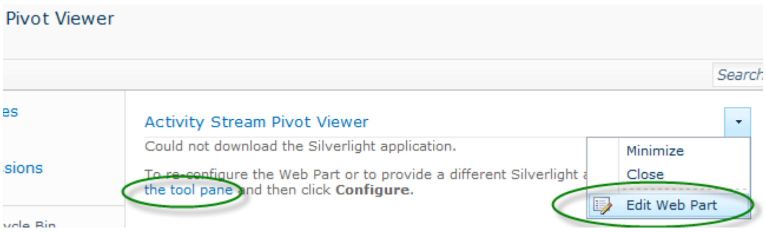
8. Click **Add**.



*Screenshot 421: Area for steps 5,6,7 and 8 are marked on this picture*

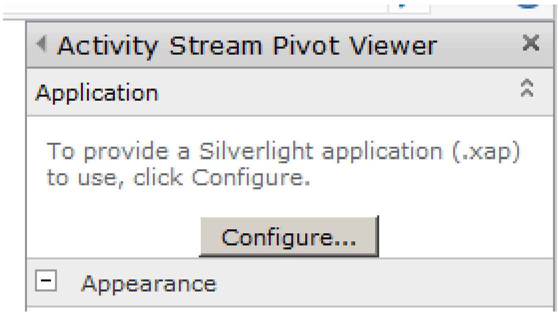
9. **Pivot Viewer** is displayed. Copy the site path portion of your URL, as shown, then from the web part menu click **Edit Web Part**, or just click the **Open the tool pane** link provided in the message.

*Screenshot 422: Copy the site path portion of URL*



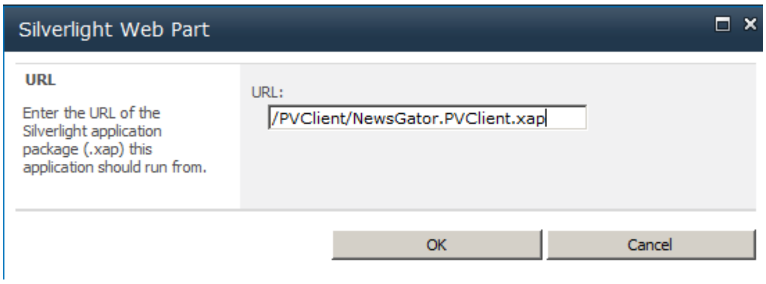
*Screenshot 423: Click **Edit Web Part** or click the **Open the tool pane** link*

10. Click the **Configure...** button in the tool pane.



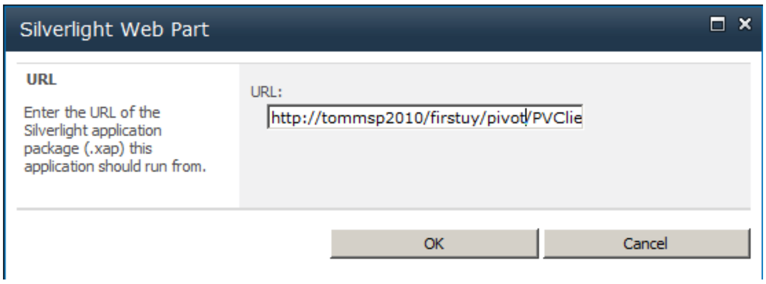
*Screenshot 424: Click Configure...*

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**



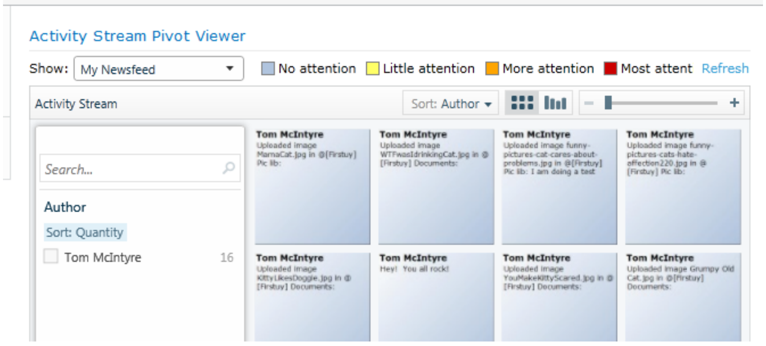

*Screenshot 425: Paste URL and click OK*

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




*Screenshot 426: Click **OK***

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




*Screenshot 427: Activity Stream Pivot Viewer*

## 1.40.3 Web part configuration

**Activity Stream web part**

### Setting Default Filter of the Activity Stream

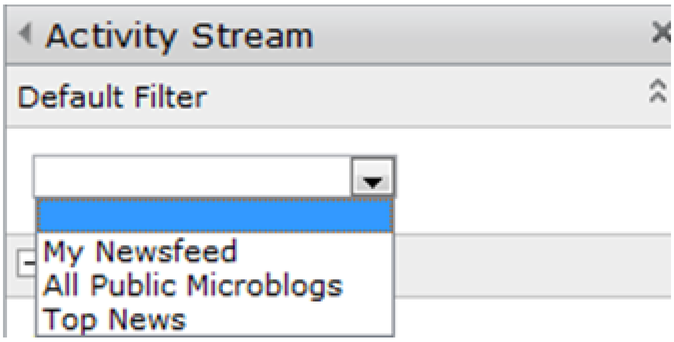
The personal activity stream always defaults to the **My Newsfeed** filter (except for users who have no events to see – where the filter switches to All Public Microblogs).

Companies can choose which activity stream filter is 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,
- Top News.

This organization-widefilter choice is made by editing the web part, and changing the "Default Filter" dropdown.

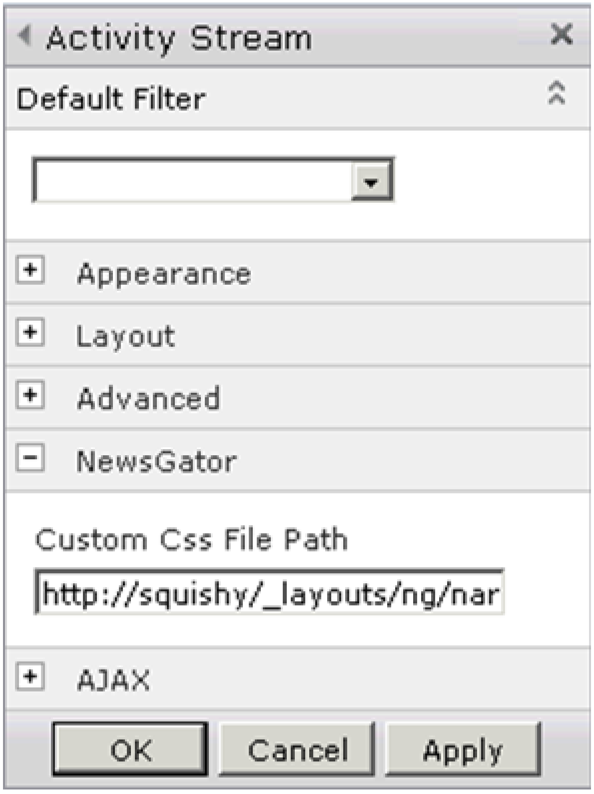



*Screenshot 428: Select Default filter*

### 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 (for example, 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**.




*Screenshot 429: 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 Aurea 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.

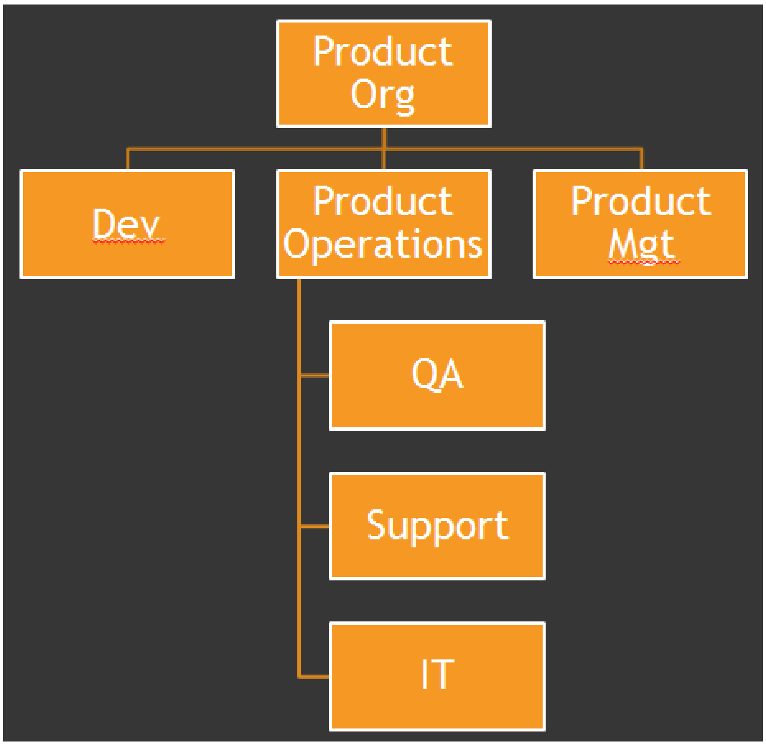
The community activity stream part has two settings to enable and control this rollup behavior.


*Screenshot 430: Two settings to enable and control the 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 below illustrates how this works:




*Screenshot 431: How* ***Community Roll-up*** *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 sees 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.

**Important notes:**

» 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).

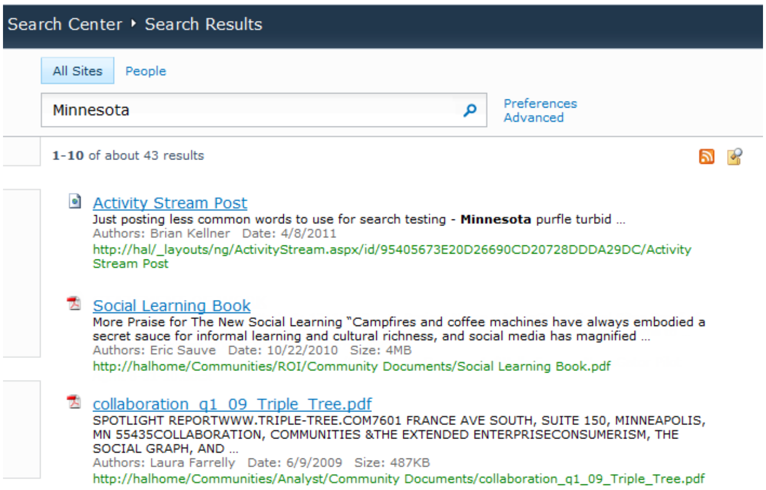
## 1.41 Search integration

### SharePoint indexing of microblogs and questions

Aurea 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.

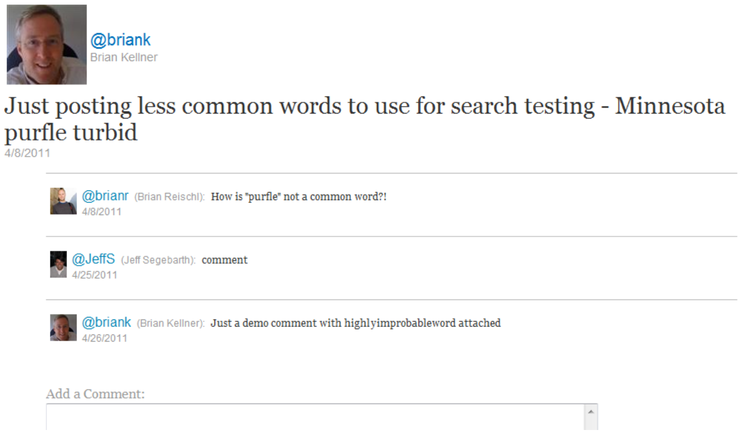
Aurea Social provides you with the capability to have SharePoint index public microblogs and questions and the comments and answers on them. Users searching through SharePoint (or FAST) search sees these items inline with other search results.

Private items are displayed (as long as the user has appropriate permissions).



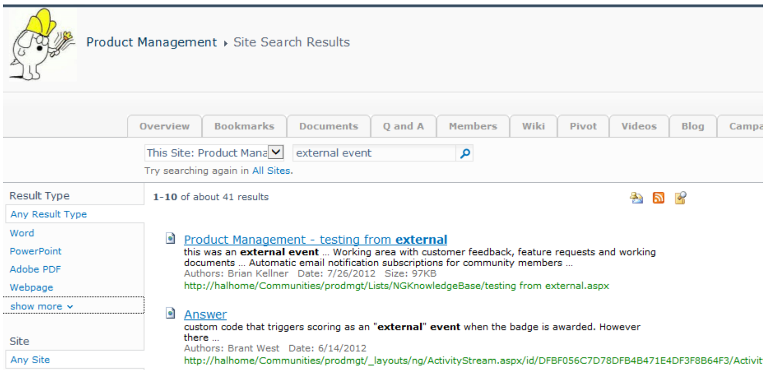

*Screenshot 432: Search Center - Search Results*

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



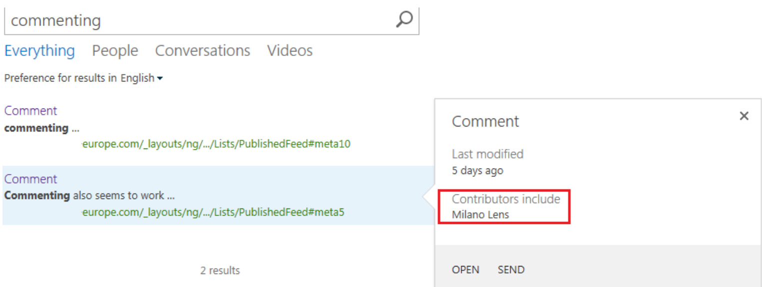

*Screenshot 433: Display page for the activity stream item*

This search integration also includes the community level:




*Screenshot 434: Search integration includes the community level*

The screenshot below shows a SharePoint 2013 search center with results that include Aurea Social posts.




*Screenshot 435: SharePoint 2013 search center with results that include Aurea 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 automatically limits 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.

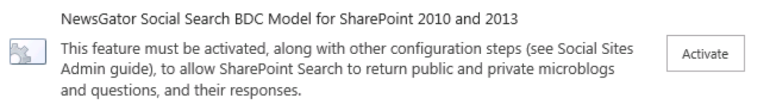
## Configuring search integration

1. Ensure that a Business Data Connectivity service application is available. The BDC service host the model that Search crawl.

> **Note:**
> This model calls through to the NewsGator Social service application.

2. 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.

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

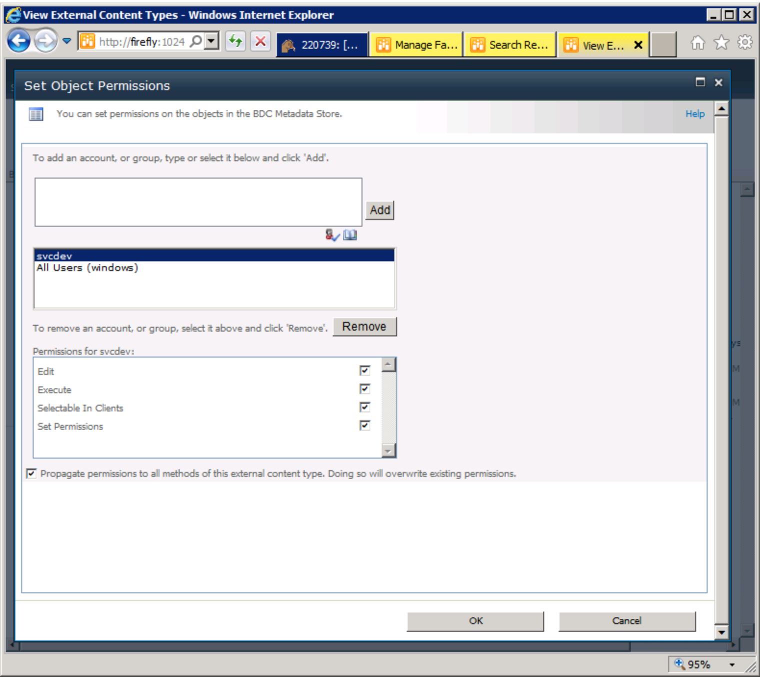



*Screenshot 436: NewsGator Social Search BDC Model for SharePoint 2010 and 2013*

4. Next, the Search indexing service needs **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".

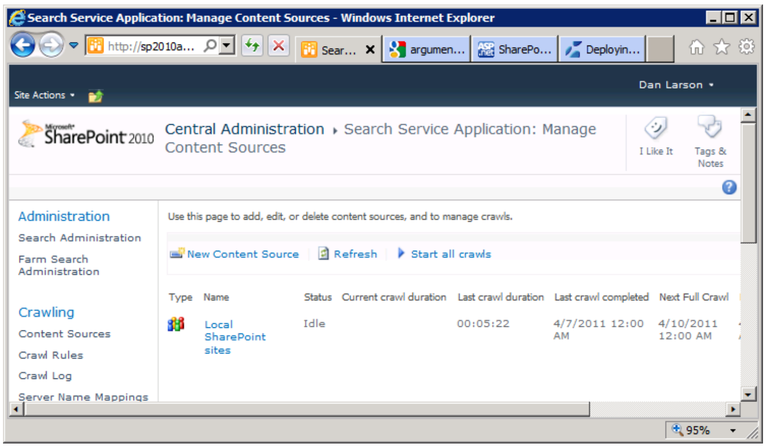
Add Execute permissions for the SEARCH SERVICE APPLICATION POOL on the Social Data BDC model in the BDC Service Application (you also need to grant an admin user "Set Permissions").

You must set this individually on the Social Sites Activity Event and Social Sites Activity Meta Event entities and on the entire Metadata Store.

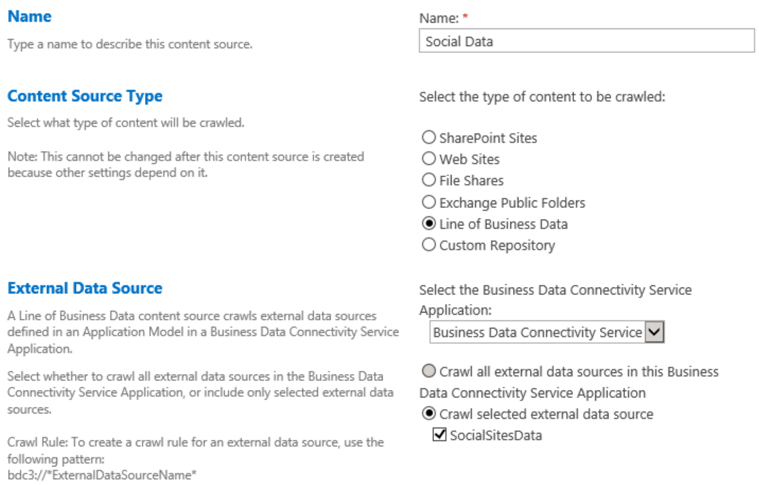



*Screenshot 437: View Externa Content Type page*

5. Create a new Content Source in Search Service Application management:




*Screenshot 438: Search Service Application management*




*Screenshot 439: Set the fields in this page*

You may 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 only adds new comments and posts and removes soft deleted items from the search index.

A full crawl takes 2-5 minutes (or more). Ensure that the crawl succeeds. A typical failure is **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 EventBDC** 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.

# 1.42 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:

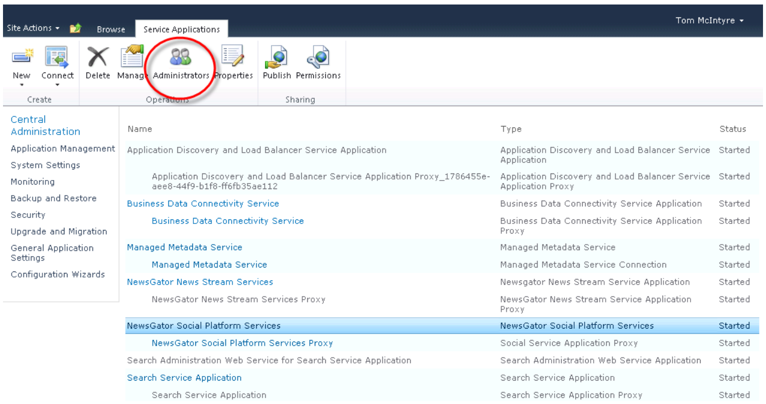
1. Open SharePoint Central Administration.

2. Under the **Application Management** area, click the **Manage Service Applications** link.

3. From the list that appears, select the service application of type NewsGatorSocial 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 **NewsGatorSocial Platform Services** displays.




*Screenshot 440: Click Administrators*

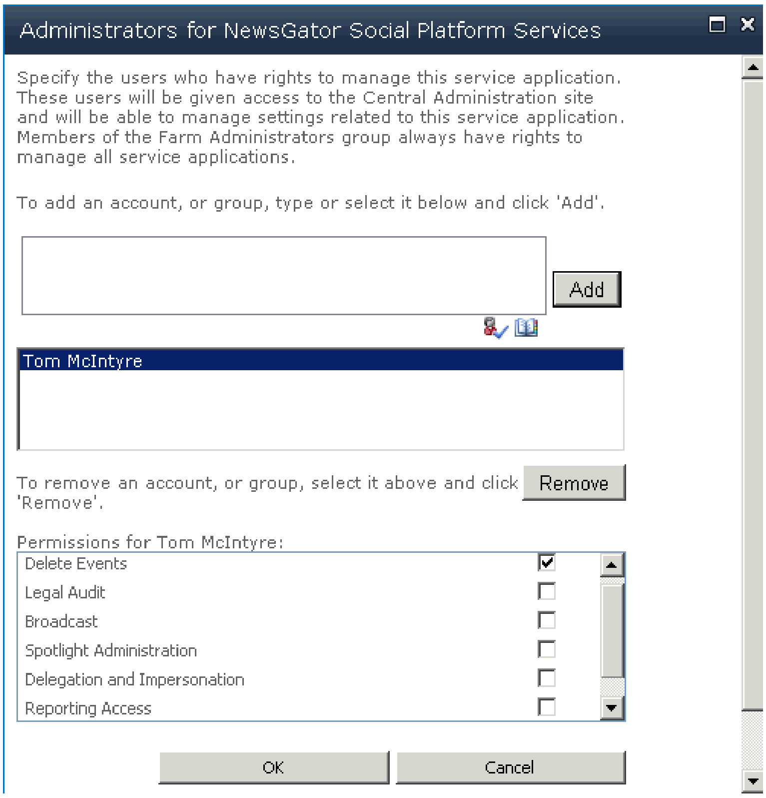
5. Type the name of the account that you want to grant permission to, with domain name, in the box at the top of the dialog.

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.




*Screenshot 441: Click **OK***

For a description of the Delete Events permission, see Ability to delete any post.

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

For a description of the Broadcast permission, see Broadcasting.

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

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

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

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.

For further details, 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 Aurea Social in a multi-farm environment.

This permission must be granted to those accounts for Aurea Social to operate properly in a multi-farm environment, and should be done as part of installation or upgrade procedures, as described in the Aurea 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.

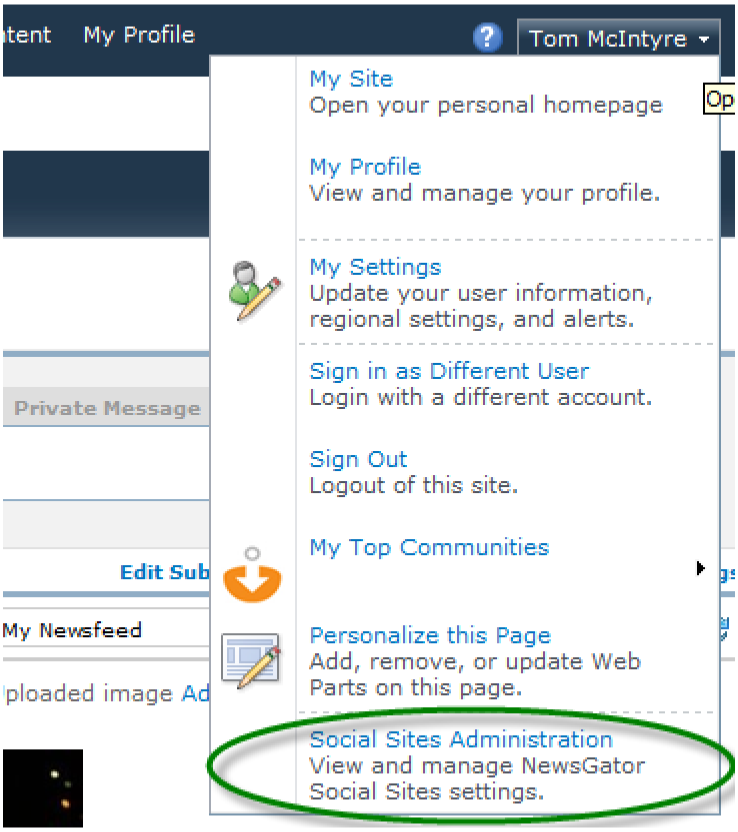
To grant this right, follow the procedures above in the Permissions for global capabilities section, and grant the Delete Events right on the Administrators for NewsGatorSocial Platform Services page.

# 1.43 Aurea Social administration page

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

- Spotlight Administration
- Legal Audit Search
- Activity Stream Broadcast
- Global Reports
- New User Statistics Report

If you have the permission to see any one of these four admin pages, you can see the **Social Sites Administration** option in your personal menu in SharePoint.




*Screenshot 442: Click Social Sites Administration*

Click **Social Sites Administration**. This brings you to the Aurea Social Administration page.


*Screenshot 443: Click any of the links listed to get to the corresponding administrative page.*

## 1.43.1 Spotlight Administration

The Spotlight Administration page is only available if the optional Spotlight module has been installed with your version of Aurea Social.

Spotlight adds expertise identification and recognition features to Aurea Social.

For instructions on administering Spotlight, see the Spotlight Module section of this guide.

## 1.43.2 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).

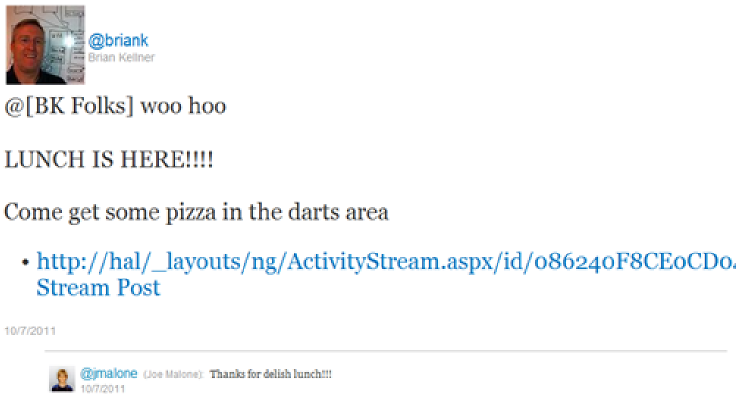
Legal Audit also includes the capability to search the full stream.

To access this capability, do the following:

1. Click the **Legal Audit Search** link on the Aurea Social Administration page. **Legal Audit search section** is displayed. The search options are fairly self-explanatory. Using multiple criteria finds the items that match all criteria.


*Screenshot 444: Legal Audit search section*

2. Click the **View** link for a particular item to show the full view of that item including the comments on it, as in this example:



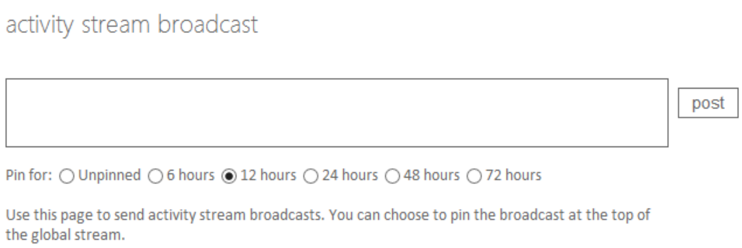

*Screenshot 445: Click* ***View***

## 1.43.3 Broadcasting

The broadcast capability is available only to those with the Broadcast permission in the NewsGator Social Platform service (see Permissions for global capabilities). It is used for sending messages to all users.

To access it, do the following:

1. Click the **Activity Feed Broadcast** link on the Aurea Social Administration page. This opens the activity stream broadcast view.




*Screenshot 446: activity stream broadcast*

2. Enter a message on the **activity stream broadcast**. A message entered here appears at the top of the **Activity Stream** for all users and stays there until the designated pinning duration passes.


*Screenshot 447: Message appears at the top of the activity stream*

Users can interact with a broadcast as with any other stream item, including liking, commenting, and finding it via search.

> **Note:**
> This represents a change for users that have used a version of Aurea 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.

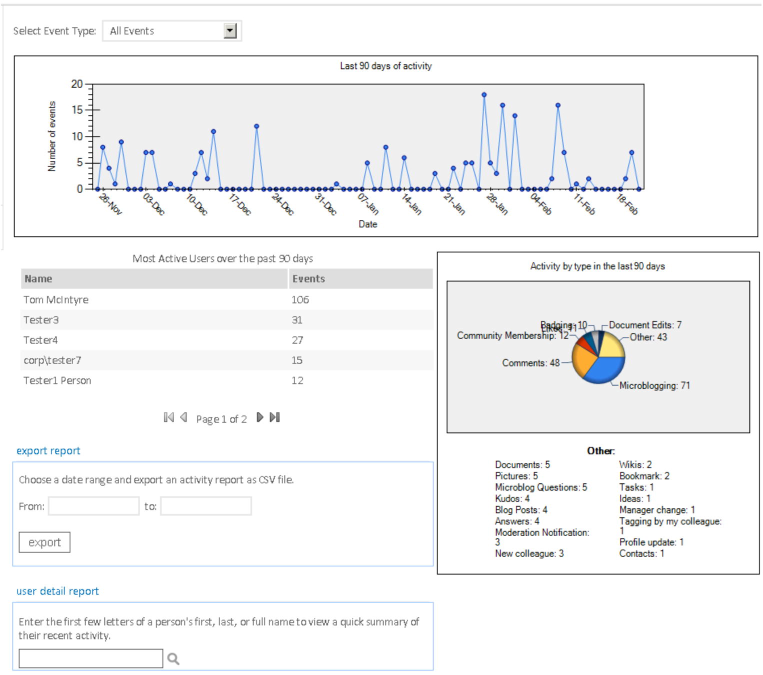
## 1.43.4 Global Activity Reporting

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.

For further details, see Permissions for global capabilities section.

1. Click the **Reports** link on the **Aurea Social Administration** page. Global activity reports is displayed. 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:**
> Placing the reporting parts in any place except a community will cause them to show the global data view.

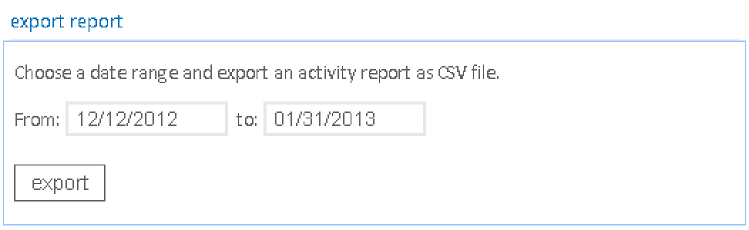



*Screenshot 448: global activity reports page*

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.

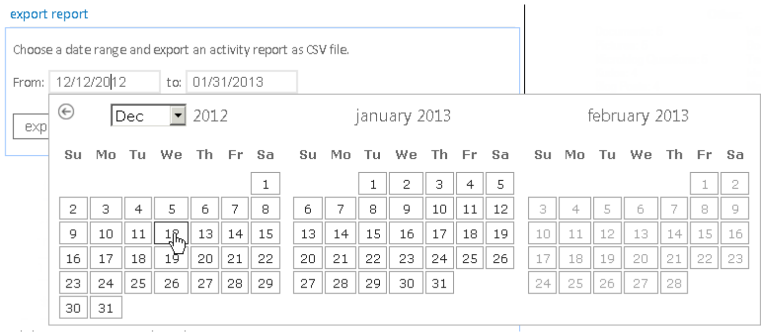
In this tabular form, reporting data can be analyzed in ways the other reporting web parts don't support.

A community-scoped version of this web part appears on the Admin tab of communities.




*Screenshot 449: export report*

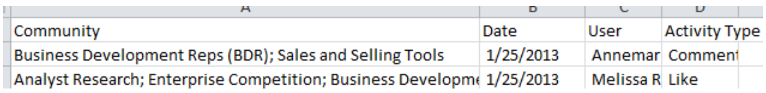
2. Click in the **from** or **to** boxes to open a date selector control. In the **From** box enter the beginning date, and in the **To** box enter the ending date, for the activities you'd like in the report.




*Screenshot 450: Select dates*

3. Click **export**. Your browser prompts you to allow opening or saving a file. Choose any.

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.

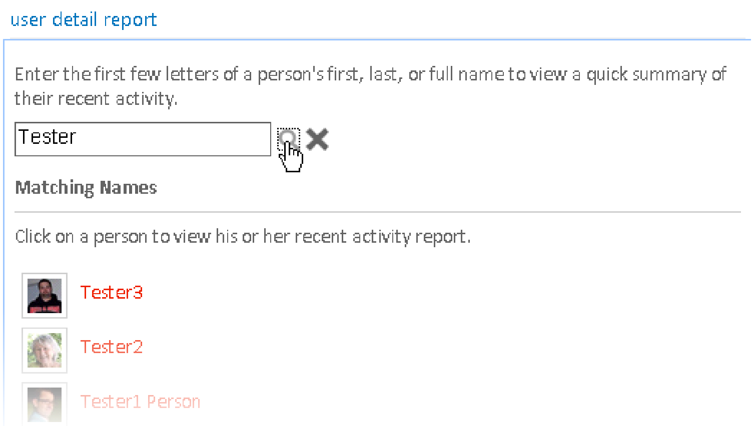


| Community | Date | User | Activity Type |
|---|---|---|---|
| Business Development Reps (BDR); Sales and Selling Tools | 1/25/2013 | Annemar | Comment |
| Analyst Research; Enterprise Competition; Business Developme | 1/25/2013 | Melissa R | Like |

> **Note:**
> The community-scoped version of this web part creates reports like this global one, but without the Community column.

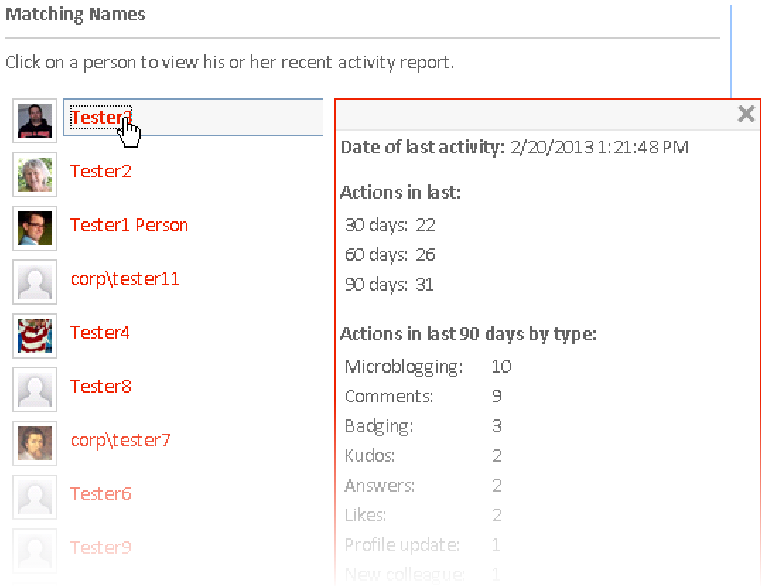
Also available on this page is a globally-scoped version of the **User Detail Report**. This shows how active a user has been, and what types of activities they've been engaging in.

1. Enter a search string and press the magnifying glass button. Matching users are listed.




*Screenshot 451: Enter a search string and press search icon*

2. Click on a specific user. A display panel is opened 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.




*Screenshot 452: Click on specific user*

## 1.43.5 User Profile Completion Report

Aurea 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.

For further details, see Permissions for global capabilities section.

Click the **New User Statistics Report** link on the Aurea Social Administration page 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 shows 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.

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 |

*Screenshot 453: The report looks like this*

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 Aurea Social or the tile in the Lookout page. The Getting Started web part allows skipping steps which is still 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.

## 1.43.6 Questions and AnswersReport

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.

*Screenshot 454: Questions and AnswersReport*

This is a report trended by calendar-month showing:

- 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.

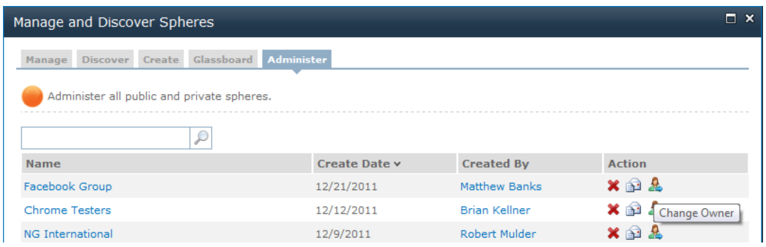
As the footnotes explain, each row is showing new questions asked in that month. If a question goes unanswered for a long period and then finally gets answered after several months, it affects the average answer time for that month.

## 1.43.7 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.

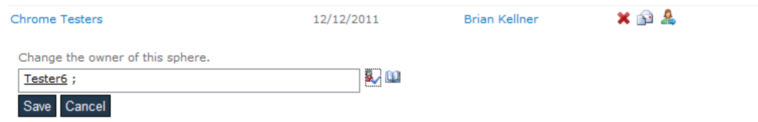
This privilege is available only to those sphere owners with the Sphere Administration permission in the NewsGator Social Platform service. For further details, see Permissions for global capabilities section.

Users who have this privilege get an additional **Administer** tab in the Spheres management UI.




*Screenshot 455: Administer tab*

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.




*Screenshot 456: Click Save to transfer ownership*

Click **Save** to transfer the ownership.

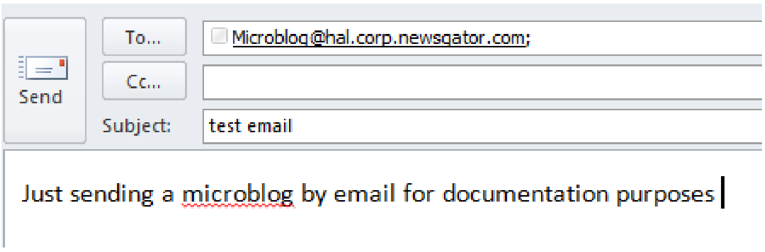
## 1.43.8 Global Email Addresses for microblogging and asking questions

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. Then:

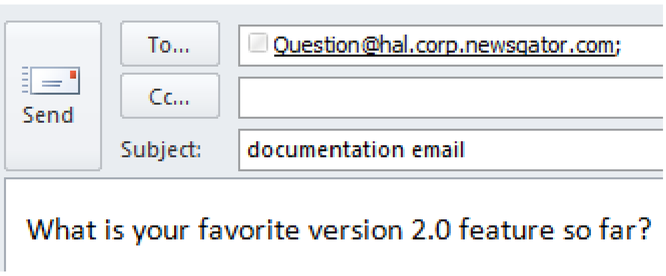
- ... to post a new microblog to your activity stream, send to `Microblog@FQDN_of_your_server`
- ... to post a new question to your activity stream, send to `Question@FQDN_of_your_server`

where "FQDN_of_your_server" is the fully-qualified domain name of the SharePoint server where you added your email handler.

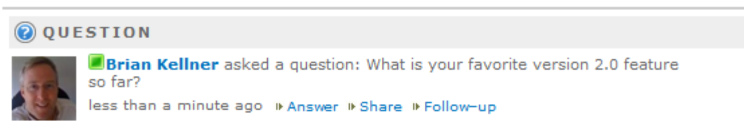



*Screenshot 457: Microblog example*


*Screenshot 458: Microblog example*




*Screenshot 459: Microblog example*

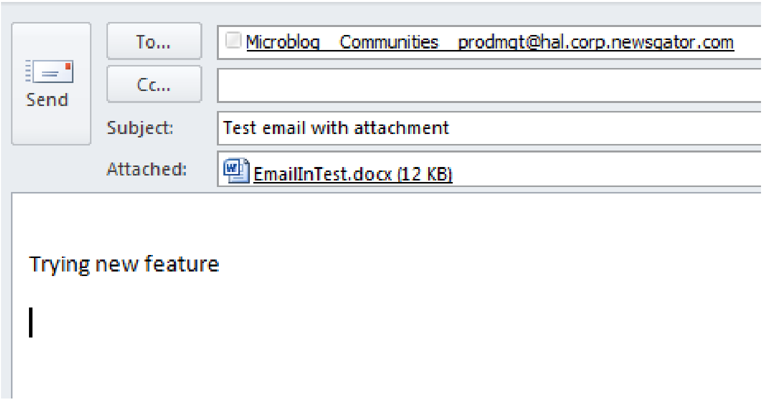



*Screenshot 460: Microblog example*

#### Handling attachments on inbound emails

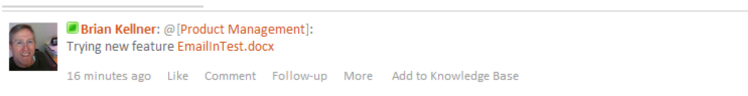
Aurea Social accepts the attachments on emails that are sent to its endpoints. It stores the attachments in SharePoint and link them in the relevant stream item (or comment).

The example email below is being sent to a microblog address for a community:



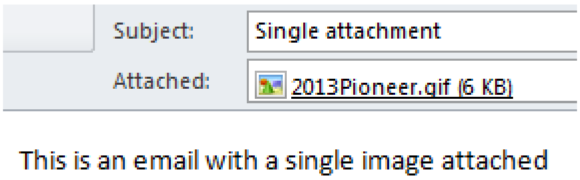

*Screenshot 461: Example email sent to microblog address*

The result is an activity stream item that looks like this.




*Screenshot 462: Activity stream item is the result for email sent to microblog address*

Images get special handling.

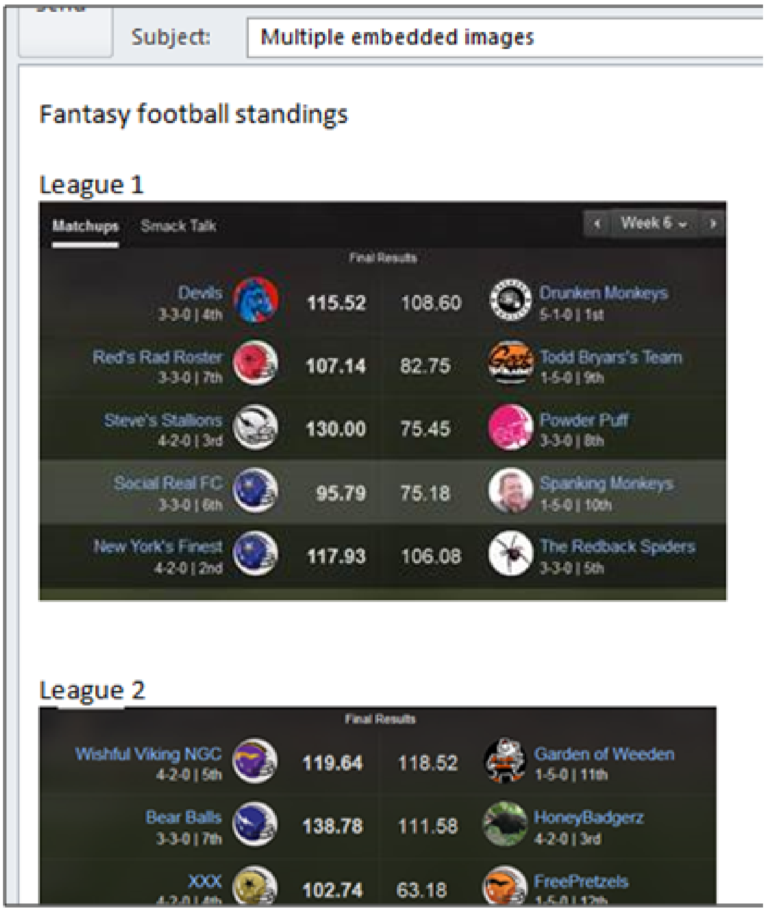



*Screenshot 463: If an email is sent with a single image as an attachment, that image is displayed in the post in the stream.*

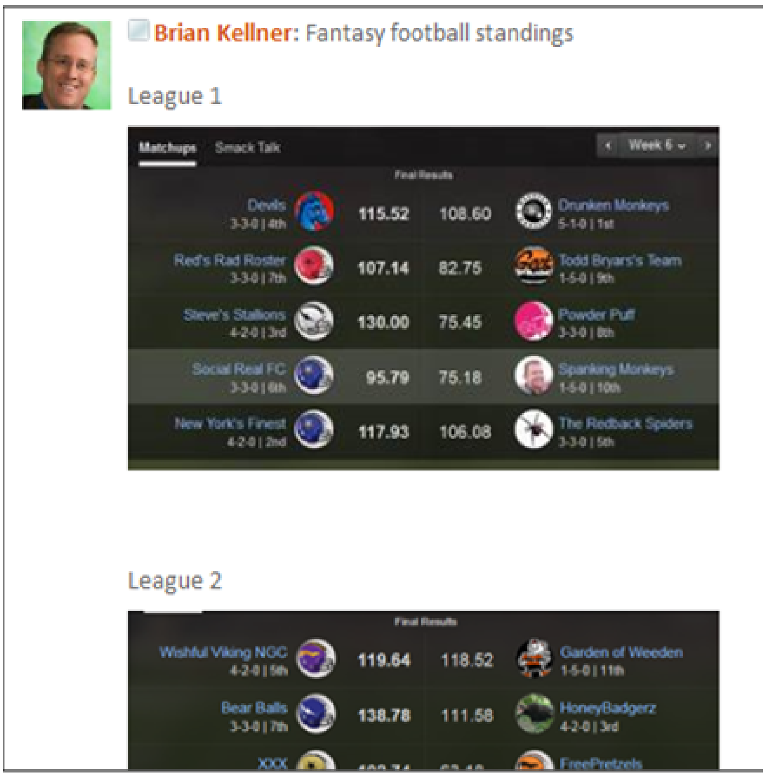

*Screenshot 464: The post shows up like this*

Emails with multiple image attachments displays 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.

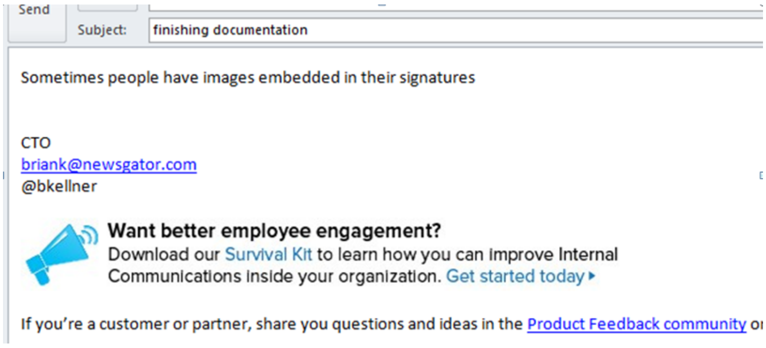


*Screenshot 465: Here is the email*

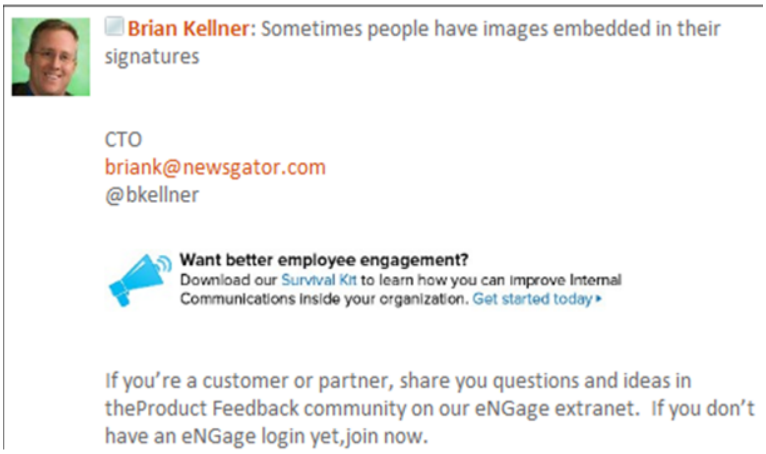


*Screenshot 466: Here is the stream entry*

When users have signatures that contain embedded images, they are included in the emails to the activity stream.




*Screenshot 467: Signatures with embedded images are in the emails to the activity stream*




*Screenshot 468: They look like this in 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.

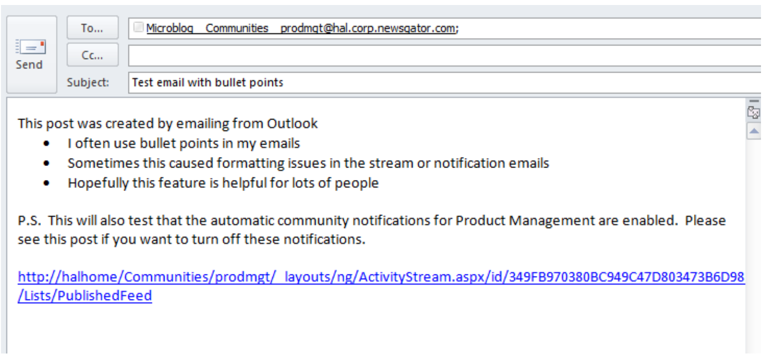
**Note:**

» Incoming email to your SharePoint server is limited in size by the SMTP settings.

» 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 need to re-implement your customizations on the new XSLTs.

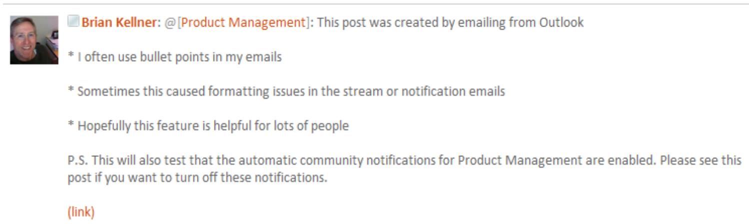
**Handling bullet points on inbound emails**

Here is an example inbound email with bullet points:




*Screenshot 469: Sample inbound email with bullet points*

This renders in the activity stream like the image below.




*Screenshot 470: Rendering in activity stream*

## 1.43.9 Event Generation Outside Communities

Aurea 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.

## 1.43.10 Aurea Social Jobs

Below tables give a descriptions for Aurea 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 Aurea 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

| | |
|---|---|
| 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 queues up, not getting converted into notifications, and therefore nobody receives notifications of these types of actions. If you have this job turned off for some time, then turn it back on, users 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

### 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 polls 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 results in activity not getting posted to the stream for most of that interval - it gets 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 polls 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 gets 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 process 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 does 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 does 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 process 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 | Aurea 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 are not warned when a campaign is about to end, about to start, nor are they alerted when an active campaign has new ideas to view.<br>No Smart Tips are 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 Aurea 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 Aurea 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.<br>This job is intended to continuously run and 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 do not become replies on the original blog or discussion item.<br>However, replies on the original blog or discussion item 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 | v2.1NOTE: 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 Aurea Social from the Glassboard application back to the Aurea Social Sphere for that board. Activity the originates from Aurea 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 are synched back to Aurea Social. |
| Data per cycle | All (all new statuses since the last synch between Aurea 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 does not change and grows 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 are never 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 makes it to the Activity Stream. Also, badges depending on SharePoint event types does 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 disables 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 are ever suggested to users as they enter their post (only old ones from before the job was shut off will be suggested). Because older ones stop being suggested when they age past one year / one month, if left off for more than a year, no suggestions appears 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 are not prompted to answer questions and askers are not prompted to mark potential good answers accordingly. |
| Data per cycle | Generates one email per curator that has questions that are unanswered within the configurable timeframe since the last time the job was ran.<br>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 gets out of sync, and things 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 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 arrives 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 continues to grow. This eventually causes 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 is available to users for their regular RSS subscriptions. Nothing else is 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 an event's age, this table grows large faster. 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 do 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 ceases to progress. No badges are 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 Aurea 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 gets encoded or added to the streaming server and therefore are never 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 introduces a longer lag time between upload and video available for viewing. |

### NewsGator Knowledge Base Like Count Synchronization

| | |
|---|---|
| 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 Aurea 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 |

## 1.43.11 Aurea Social News Stream module

**Overview**

The News Stream module for Aurea Social provides RSS and ATOM feed aggregation, filtering and distribution capabilities which are tightly integrated into the Aurea 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 Aurea 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.

For further details, see the Defining the system feed collection section to learn how to define the feeds that is 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 informs 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 removes 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.

For further details, 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).

For further details see, Aurea Social user guide.

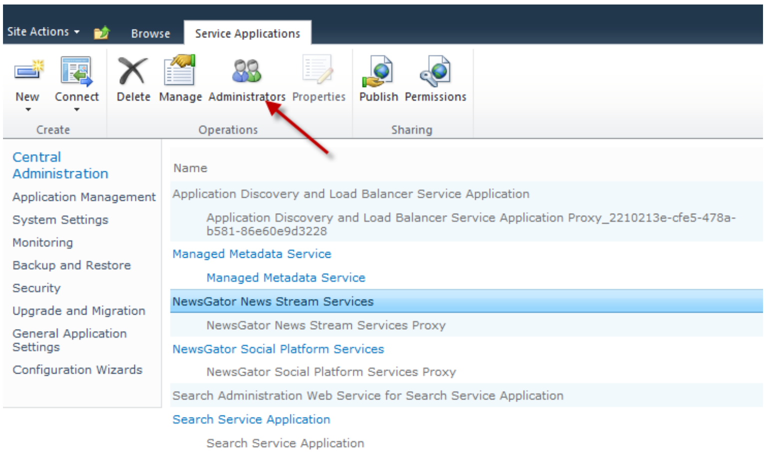
## Specifying News Stream administrators

Before you can begin using the functionality, you 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.

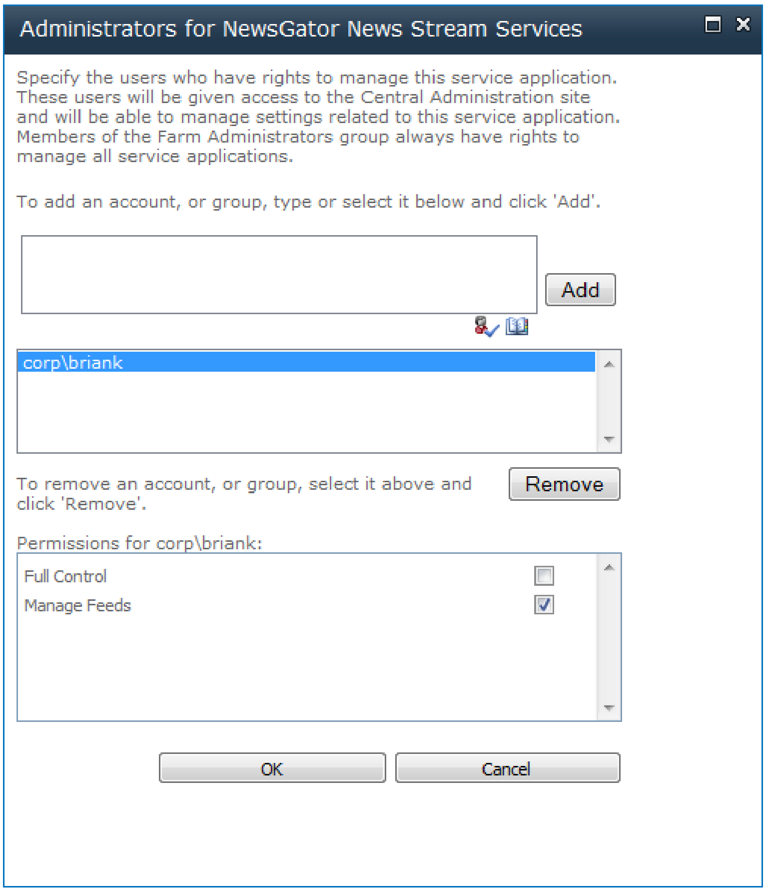
You specify which people may create and maintain this collection of feeds by granting each of them the Manage Feeds permission for the NewsGator News Stream Service Application.

In Central Admin after highlighting this service, click the **Administrators** button in the ribbon.




*Screenshot 471: Click Administrators*

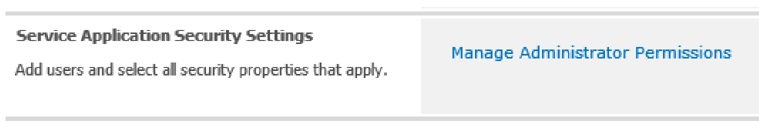
This displays the dialog for selecting people and giving them the appropriate permission.




*Screenshot 472: Add people and give permission*

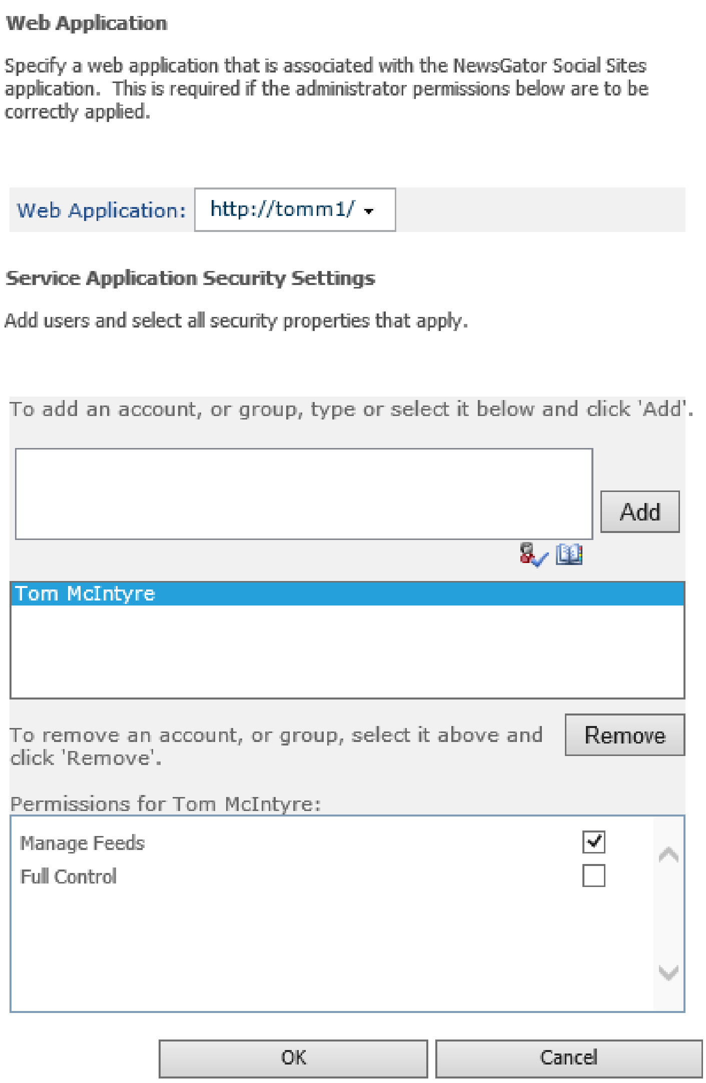
If you have difficulty opening or using this dialog, you can do the same things in another UI, by clicking the text of the NewsGator News Stream Services application above (instead of just highlighting its row).

This brings up the **News Stream Service** application's management page. One its sections looks like this:




*Screenshot 473: Click Manage Administrator Permissions*

Clicking the **Manage Administrator Permissions** link brings up the following page:




*Screenshot 474: Page to manage administrator permission*

The only additional step required when using this interface is that you must first specify the web application that is associated with Aurea 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.

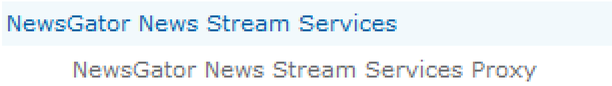
Some problems that may occur during installation can be resolved without need of rerunning the installer. The middle three subsections below each describe a section within the NewsGator News Stream Service Application's management page that allows you to repeat a News Stream installation step in isolation, 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, do the following"

1. Go to the **SharePoint Central Administration > Manage Service Applications**.

2. On that screen, click on **NewsGator News Stream Services**.




*Screenshot 475: Click on* ***NewsGator News Stream Services***

## Debug section


*Screenshot 476: Debug information for the database connection and the backend proxy*

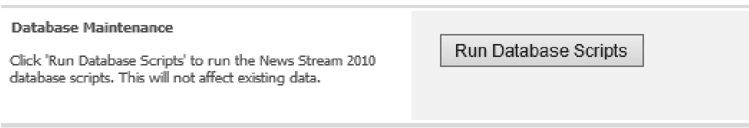
At the bottom of the News Stream Service Application's management page is a section showing debug information for the database connection and the backend proxy.

The first string shows what you 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 have 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 shows 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 in the Service Application Proxy section.

## Database Maintenance section




*Screenshot 477: Click Run Database Scripts*

When you are installing or upgrading Aurea 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 see the message **Database successfully upgraded** appear beneath this button.

## Service Application Proxy section


*Screenshot 478: Click the Unprovision button*

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 Aurea 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

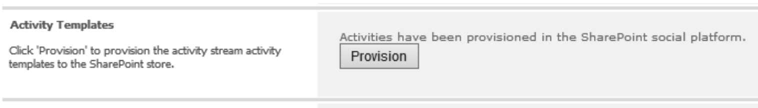
Application's management page shows that the proxy is not responding (see "Debug section"), try reprovisioning the proxy by clicking the Provision button in this section.

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 Aurea 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




*Screenshot 479: Click the* ***Provision*** *button*

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. Aurea Social adds many additional types of activity to the SharePoint activity stream by provisioning activity templates to the SharePoint social platform.

This is initially doneduring any install or upgrade of Aurea 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.

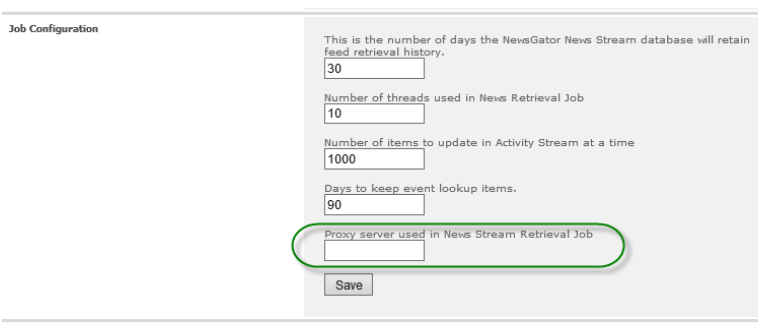
If properly provisioned, you should see a message **Activities have been provisioned in the SharePoint social platform**, as pictured above. Otherwise, click the **Provision** button to add these activity types.

### 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, follow the below steps:

1. Find the **Job Configuration** section of the management page (pictured below).
2. Identify your proxy server in the **Proxy server used in News Stream Retrieval Job** box.
3. Click the **Save** button immediately below this.

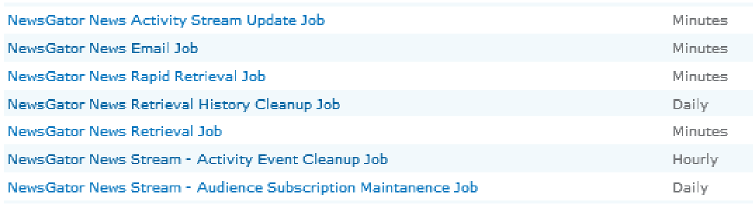



*Screenshot 480: Click Save*

## 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**:

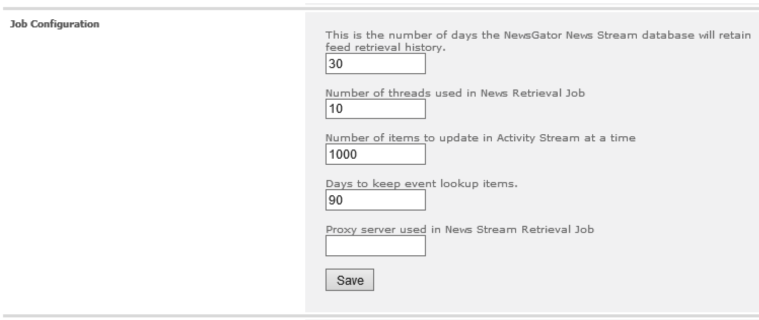


| | |
|---|---|
| NewsGator News Activity Stream Update Job | Minutes |
| NewsGator News Email Job | Minutes |
| NewsGator News Rapid Retrieval Job | Minutes |
| NewsGator News Retrieval History Cleanup Job | Daily |
| NewsGator News Retrieval Job | Minutes |
| NewsGator News Stream - Activity Event Cleanup Job | Hourly |
| NewsGator News Stream - Audience Subscription Maintanence Job | Daily |

*Screenshot 481: Review job definitions*

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.




*Screenshot 482: Job Configuration*

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 attempts to retrieve one quarter of all the feeds each time it runs.

Retrieving a great number of feeds creates significant load. While sizing is 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 affects 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 adds 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 adds the article to the stream.

The publish date of the article is kept as it appeared in the source feed (for example, if an article has a published date that is 30 hours in the past, it is added to the stream and the published date is 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 attempts to check all the users' interests against an admin-specified number of newly retrieved articles within each cycle.

The load created by this job depends 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.

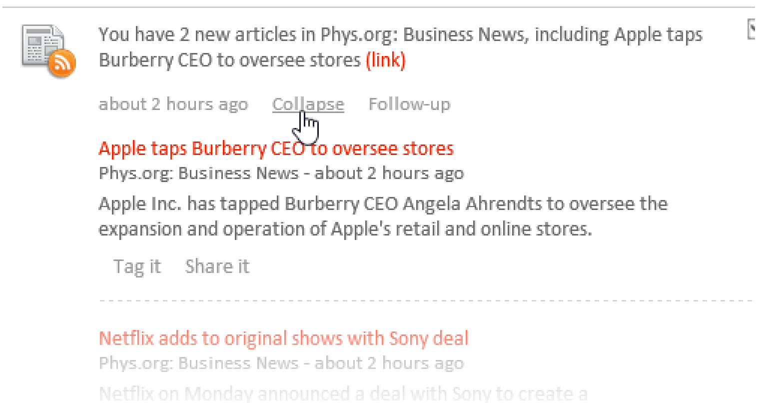
### Cleanup / retention

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 alerts a user to new articles:




*Screenshot 483: Click Collapse*

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 prevents 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 does 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, are covered later).

This section explains how to define the system feeds. It then explains 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

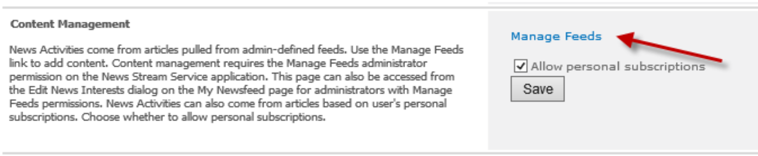
#### Navigating to the Manage Feeds page

Any people who have been granted the Manage Feeds permission on the NewsGator News Stream Service Application can define and manage the collection of system feeds.

For further details, see Specifying News Stream administrators.

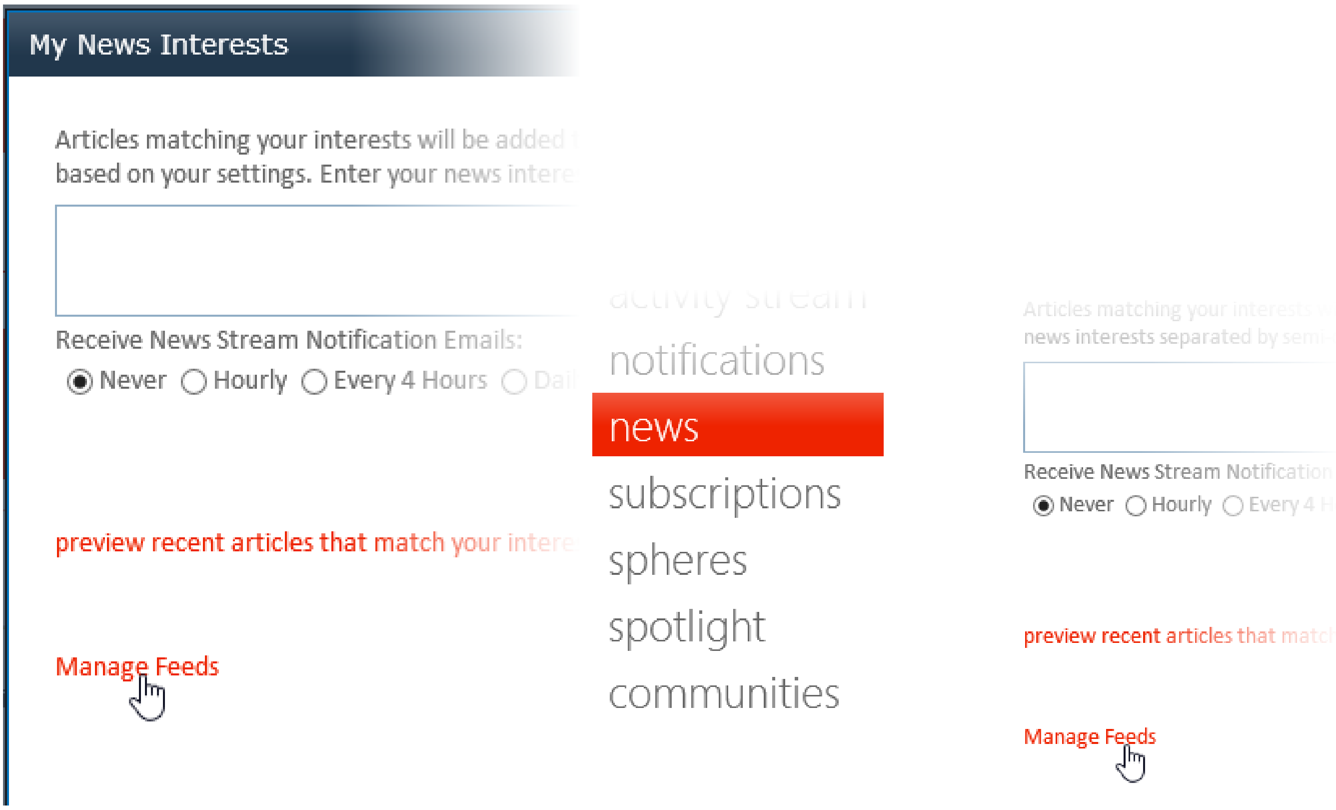
To allow navigation to the administrative page for managing these central organizational subscriptions, a **Manage Feeds** link is provided to these users in four different places:

- In the Content Management section of the management page for the News Stream Managed Service Application



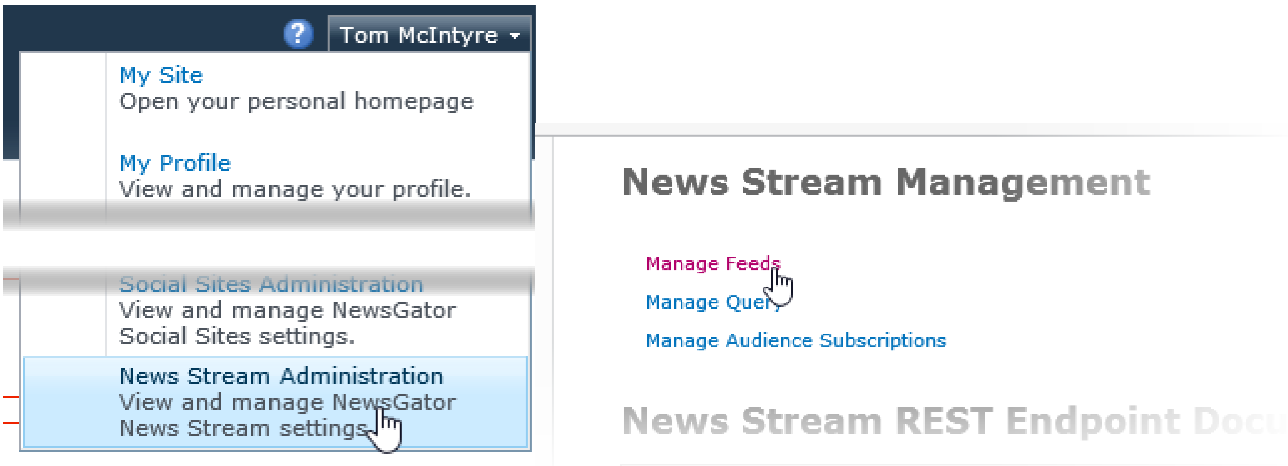

*Screenshot 484: Access **Manage Feeds** from the Content Management section*

- In the **Edit News Interests** dialog, accessible via a link on the **Activity Stream** web part on the **My Newsfeed** page
- In the equivalent tab within the Settings dialog




*Screenshot 485: Access **Manage Feeds** from the **Settings** dialog*

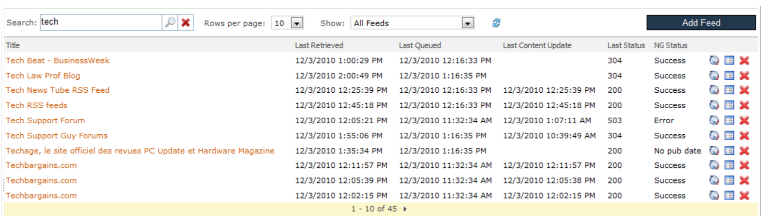
» On the News Stream Administration page, which can be accessed from your personal Welcome menu




*Screenshot 486: Access **Manage Feeds** from **News Stream Administration** page*

Feed administrators can also navigate directly to this page by going to `http://<host>/_layouts/ng/nm/ManageFeeds.aspx`.

## Managing feeds



*Screenshot 487: The manage feeds screen with subscriptions already on it looks like this*

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.

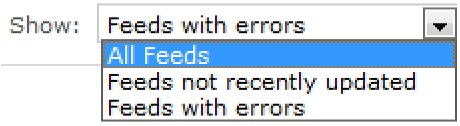
The base display shows feeds in the system along with data on their retrieval. The **Ping** (globe with arrows icon) function attempts an immediate retrieval of the feed. Ping does not work for feeds which require credentials to be retrieved.

The **Details** (rectangular box icon) function shows information about prior retrieval attempts while the **Delete** (red X icon) function stops the further content from that feed from being retrieved (but does not remove existing articles from the database).

| 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 |

*Screenshot 488: An example detail view*

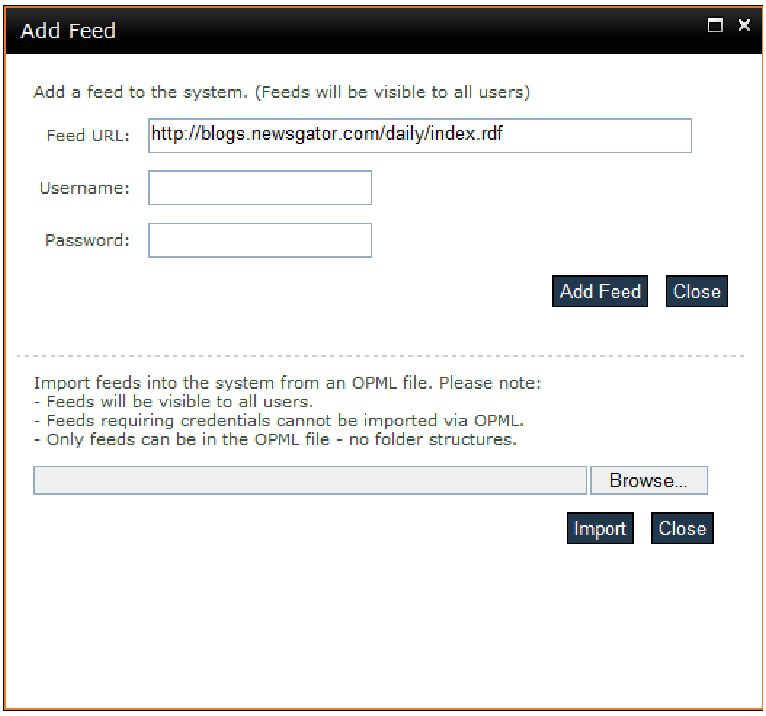
The **Show** filter allows viewing which haven't updated recently or which have errors. This is useful for identifying feeds that you may want to remove from the system.




*Screenshot 489: Show filter*

### 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 (for example, domain \ username).

**Important Note:**

All feeds are treated as public content. All contents retrieved from all feeds are available to all users.

Later versions of News Stream supports the concept of individual feeds being securely retrieved for and only visible to individual users.

**Note:**

Search feeds created in external systems such as Google News and Twitter 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

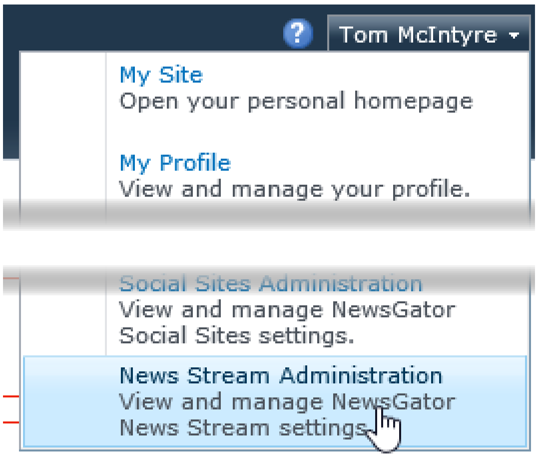
In some cases, administrators know that specific users should receive specific content. News Stream contains a mechanism to automatically subscribe a SharePoint audience to one or more feeds.

This creates a personal subscription for each member of the audience. A SharePoint audience can be defined using profile properties (for example, 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.

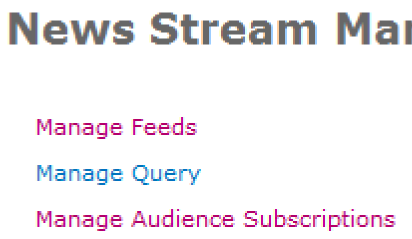
You need the **Manage Feeds** permission on the NewsGator News Stream Service to define audience.

1. Click the **Manage Feeds** link from the **Edit News Interests** dialog in the activity stream. Alternatively, click the **News Stream Administration** option in the welcome menu.




*Screenshot 490: Click **News Stream Administration***

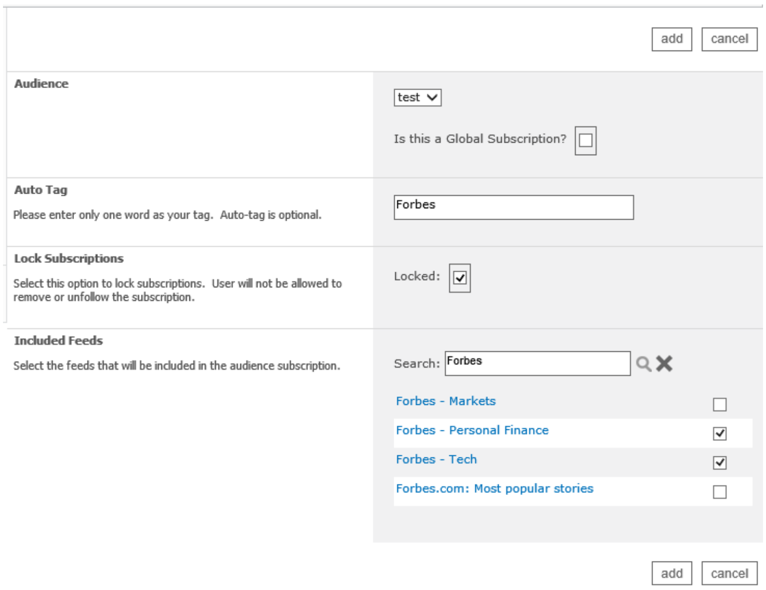
2. You are taken to a **News Stream Management** page with three main choices.




*Screenshot 491: **News Stream Management** page*

3. Click **Manage Audience Subscriptions**. You are taken to the page where existing subscriptions may be edited and new ones may be added.

4. Click the **Add** button. A dialog opens, where you can fill in the details.




*Screenshot 492: Dialog that opens on clicking Add (example)*

5. Fill in the following details on the opened dialog:

» Pick **Audience** from the drop-down.

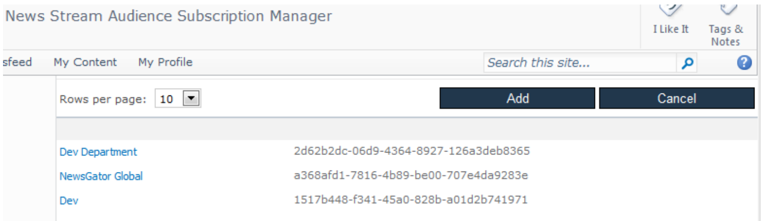
» **Auto-Tag** lets you choose to add a hashtag to these feeds automatically.

» 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 the example, “Forbes” is used as a filter and two feeds are selected.

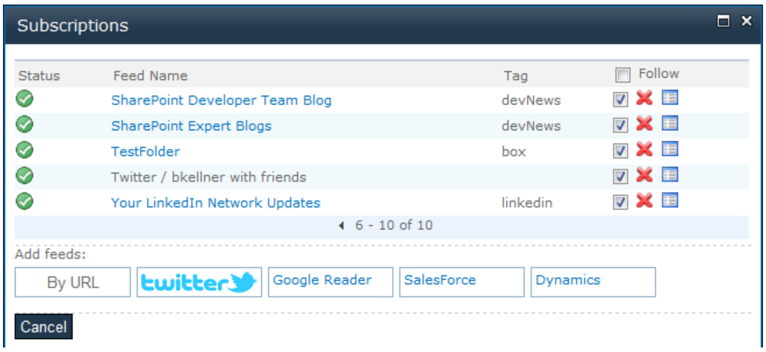
> **Note:**
> This interface shows personal subscriptions as well as public subscriptions added for the whole company. In this way, an administrator can subscribe to a feed (for example a feed which needs credentials) as a personal subscription and then use that as a way to add a subscription for others.

6. Click **Add**. The subscriptions are added for users and the new audience is listed on the initial page.



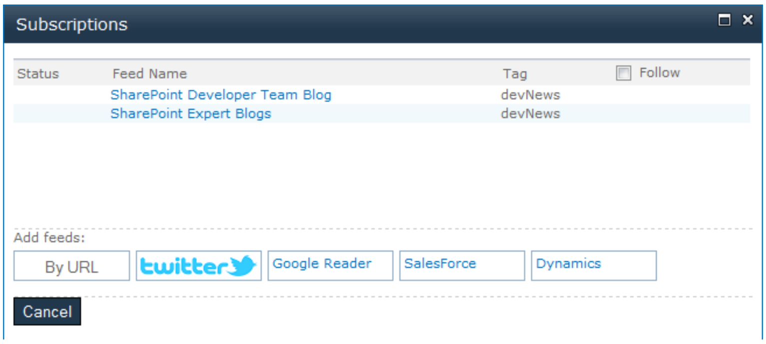

*Screenshot 493: Click Add*

An administrator viewing these subscriptions from the Edit Subscriptions dialog sees them with the option to stop following.




*Screenshot 494: Option to stop following available*

For a non-administrative user, the subscriptions appear without the choice to stop following because of the “locked” setting.




*Screenshot 495: Option to stop following not available*

**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.

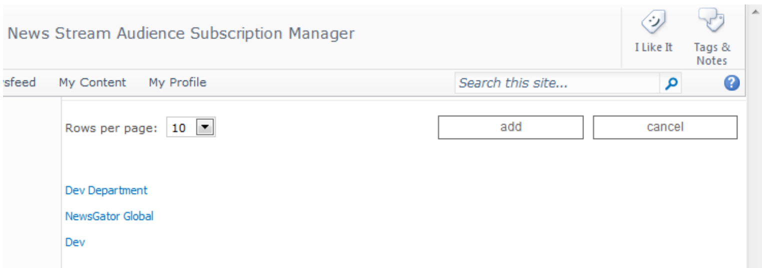
» If you were using a credentialed feed that someone added personally, and that person deletes that feed from their personal subscriptions, the feed will no longer provide updates to the audience.

## 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.

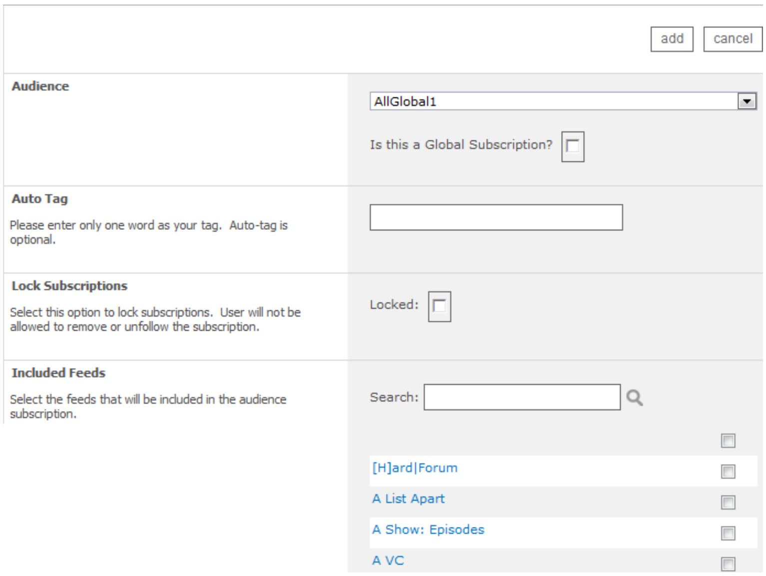
However, when the goal is to make sure that the news is shown to every user who views the activity stream, it’s much more efficient to use the global subscription capability.

From the same News Stream Audience Subscription Manager page used for subscribing an audience to a feed, click the **add** button.




*Screenshot 496: Click add*

To make a global subscription instead of an audience-based subscription, check the **Is this a Global Subscription?** box.




*Screenshot 497: Check the **Is this a Global Subscription?***

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:**
> 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.

For further details, see Defining the system feed collection and deploying the News Query web part.

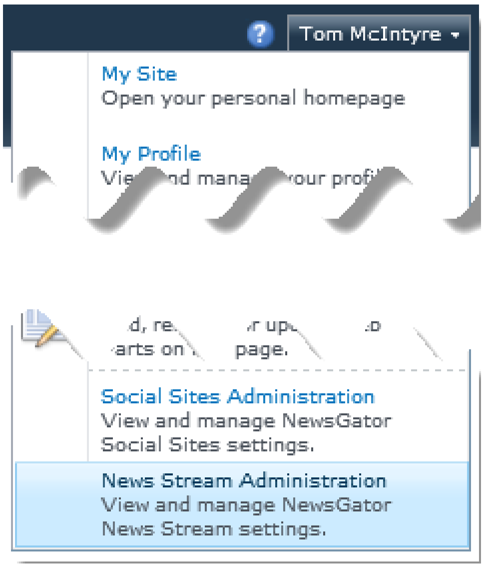
The administrator-defined system feeds can be queried in a variety of ways to display articles matching a particular theme, and/or from a particular set of system feeds. While the display of a query's matching results is done via an instance of the News Query web part, definition of the queries available 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. For further details, see the Specifying News Stream Administrators.

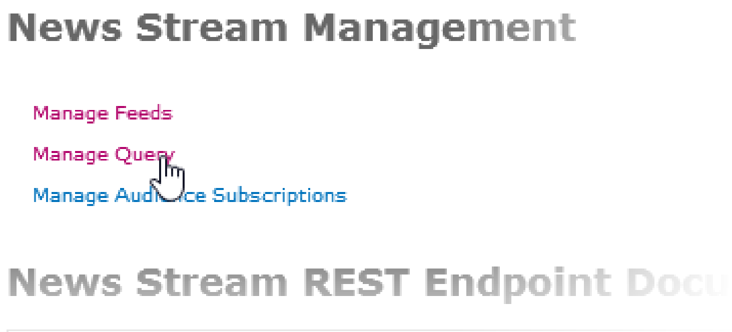
You then have two options for navigating there:

» Go directly to the link `http://<host>/_layouts/ng/nm/ManageQuery.aspx`.

» Select the **News Stream Administration** link at the bottom of your Welcome menu. And then select the **Manage Query** link on the News **Stream Management** page.

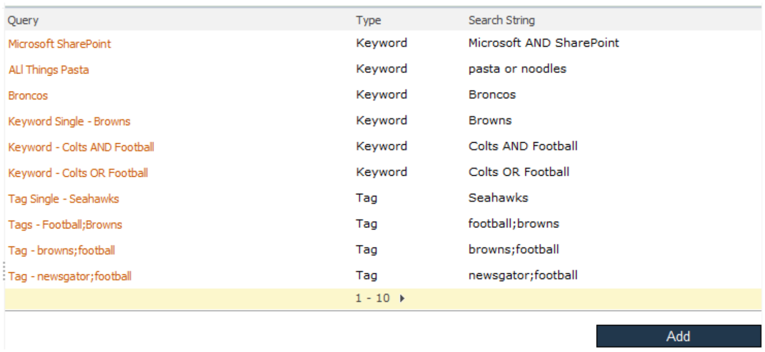



*Screenshot 498: Select the* ***News Stream Administration*** *link*




*Screenshot 499: Click Manage Query*

The following is an example of what the **Query Management** page looks like with some queries already defined:

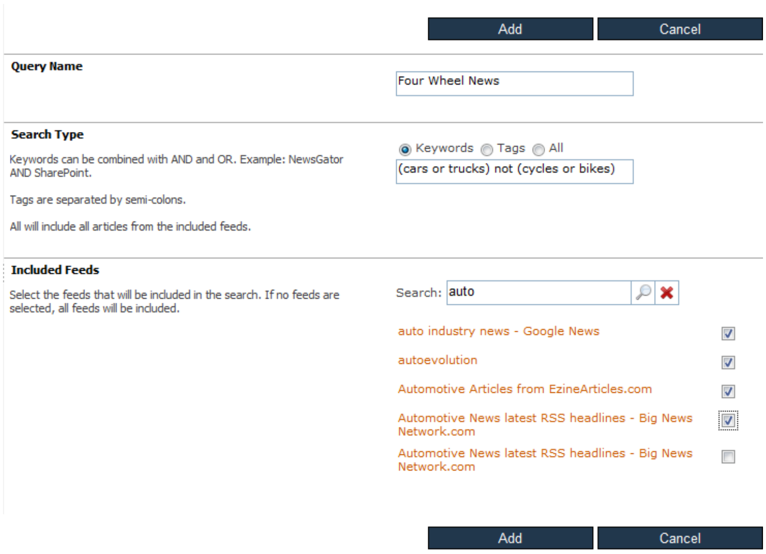


| Query | Type | Search String |
|---|---|---|
| Microsoft SharePoint | Keyword | Microsoft AND SharePoint |
| ALl Things Pasta | Keyword | pasta or noodles |
| Broncos | Keyword | Broncos |
| Keyword Single - Browns | Keyword | Browns |
| Keyword - Colts AND Football | Keyword | Colts AND Football |
| 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

*Screenshot 500: Query Management page*

Click a query name to display it for editing. Click the **Add** button to open a dialog to create a new query. Below is the query creation screen with a new query in progress.




*Screenshot 501: query creation screen*

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 searches 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 are 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) are 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, theNews Query and News Search web parts, show content from the centrally-managed system feed collection.

The 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.

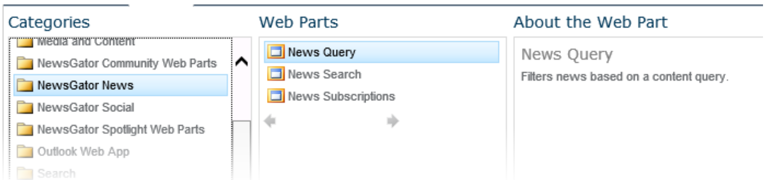
When adding web parts to a web page, these two are listed within the NewsGator News category.

## 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.

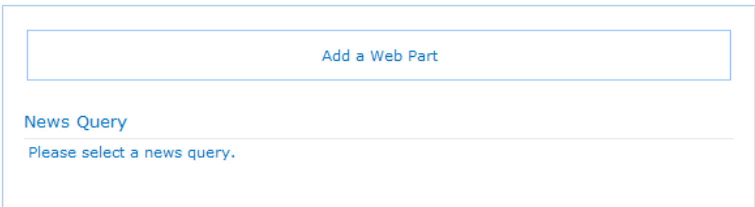



*Screenshot 502: Three web parts for displaying articles*

## News Query web part

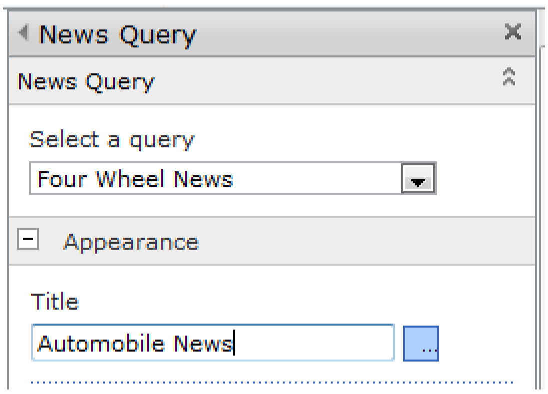
This web part works with the centrally defined queries described above (see Defining the system feed collection and Filtering - Creating and Managing Queries for instructions on setting these up).

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.




*Screenshot 503: News query part*

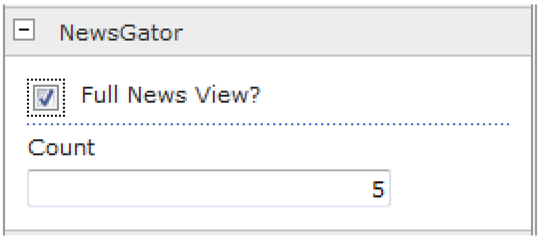
Pick one of the already created queries, and give the web part a more descriptive title.



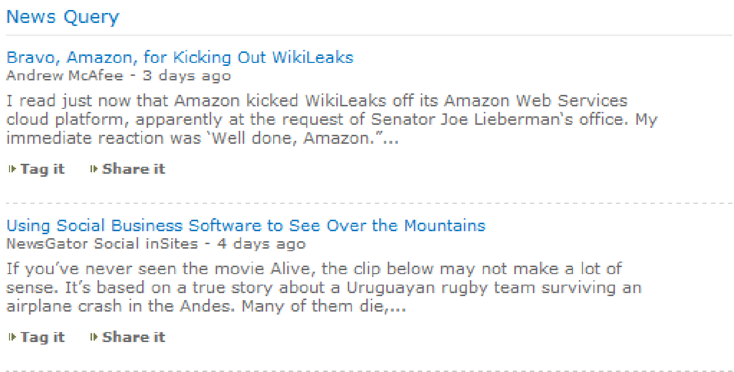

*Screenshot 504: Give a title and pick a query*

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 is displayed.




*Screenshot 505: Enable Full News View option*



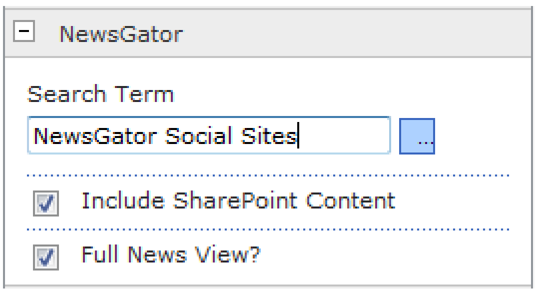

*Screenshot 506: Source and time of publishing is displayed*

When the Full News View option is NOT selected, the source and time of publishing is NOT displayed.


*Screenshot 507: Source and time of publishing is not displayed*

## News Search web part

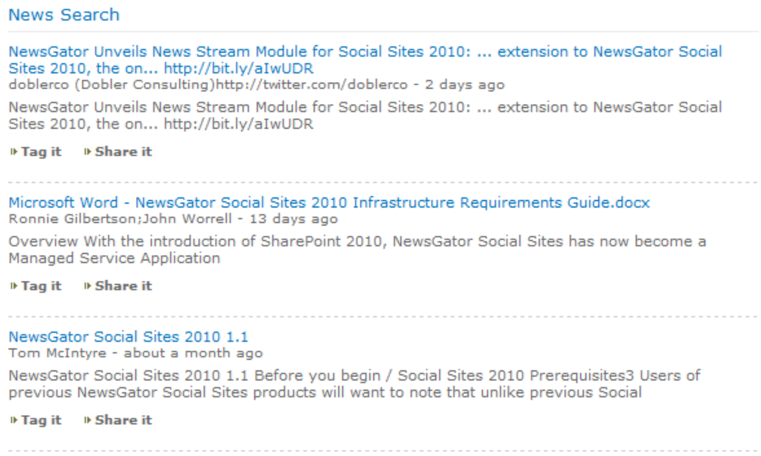
This web part performs a query at the moment the user views it. The site owner can configure a search string as well as deciding if the SharePoint search results should be included.




*Screenshot 508: Configure a search string*

If the **Include SharePoint Content** box is checked, SharePoint search is used (including trimming for the viewing user) to provide results which is 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.

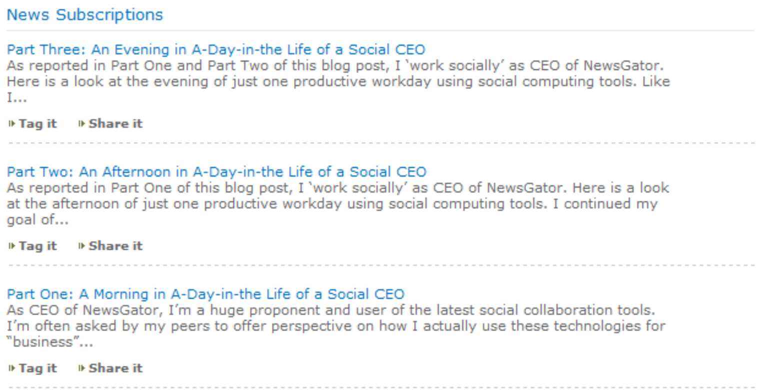



*Screenshot 509: Illustration this with one RSS article followed by two SharePoint results*

## News Subscriptions web part

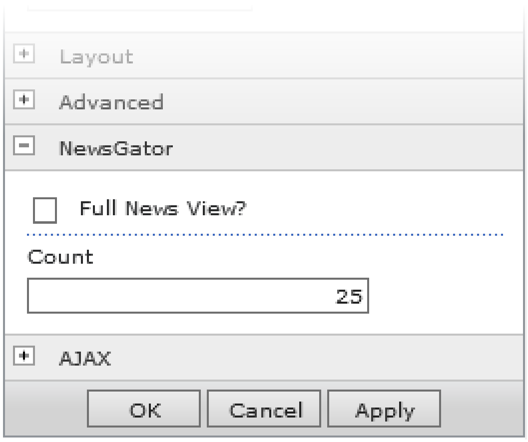
This web part shows the articles from the feeds a user has in their personal subscriptions. This is especially helpful for users who want a persistent view of all their most recent articles.

(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.)




*Screenshot 510: News subscription*

There are two configuration settings provided in the NewsGator section when editing this web part.

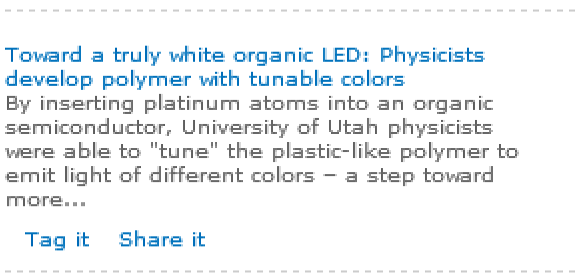



*Screenshot 511: Enter the count*

Count determines the number of articles to show.

When the Full News View option is selected, the source and time of publishing is displayed. Without this option, the display is slightly smaller.

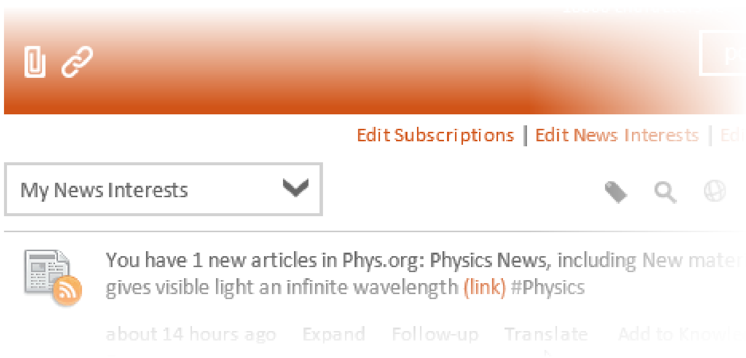

*Screenshot 512: Source and time of publishing is displayed*




*Screenshot 513: Source and time of publishing is not displayed*

## 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**.




*Screenshot 514: My news interest*

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), users can get these alerts with links to articles that interest them in their newsfeeds, and can 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:**

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 article 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 Aurea Social clients can display them.

For more information, see Aurea Social User guide.

## 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 Aurea 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.

For details on steps users must take to integrate their external accounts with News Stream, see the Aurea Social v5.5 User Guide with Web Part Summary.

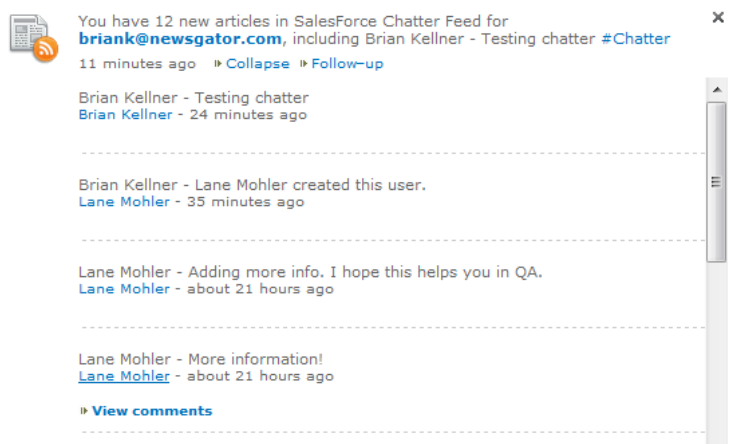
### Salesforce Chatter integration

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 Aurea 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.

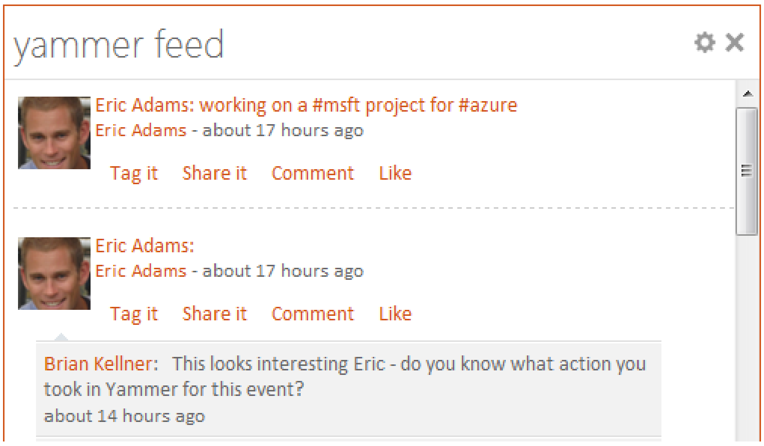
Chatter is a capability in the Salesforce product to have an activity stream around people or objects in Salesforce that users choose to follow.

Once a user has integrated their Salesforce Chatter account into Aurea Social, they are able to view and also comment on their Salesforce Chatter feed items from the Aurea Social activity stream (that is to say, the comments they make in Aurea Social are copied back into Salesforce Chatter).




### Yammer feed integration

There are no administrative steps necessary before user can integrate with their Yammer feeds.



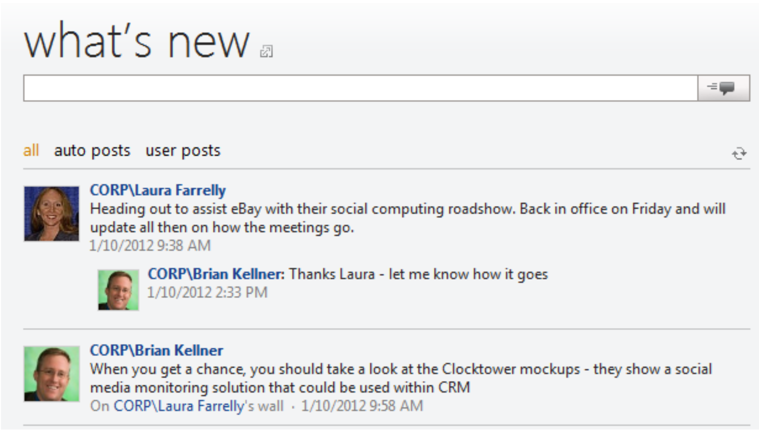

Screenshot 515:

Screenshot 516: Yammer feed

Once a user has integrated their Yammer account, they are able to comment on, like, tag, and share their Yammer feed items from the Aurea Social activity stream. Entering a comment is very similar to a normal Aurea Social comment however @ targeting and auto-completion of hashtags after typing # are not supported.

## Dynamics CRM Integration

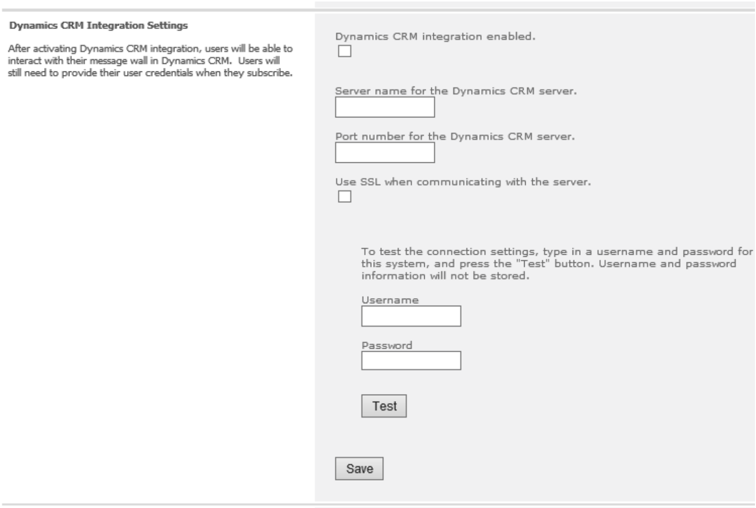
Starting in the R7 release, the Microsoft Dynamics CRM product has had a social feed. Inside CRM, users see this view in the What's new screen.




Screenshot 517: What's new screen

News Stream allows a user to pull this feed into Aurea Social. From Aurea Social, users can tag or share items and also comment on them. Comments added to CRM activity stream items in Aurea 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 see the option to integrate their Dynamics CRM feeds into Aurea Social. It is enabled and configured in Central Administration, in the NewsGator News Stream Services management page.



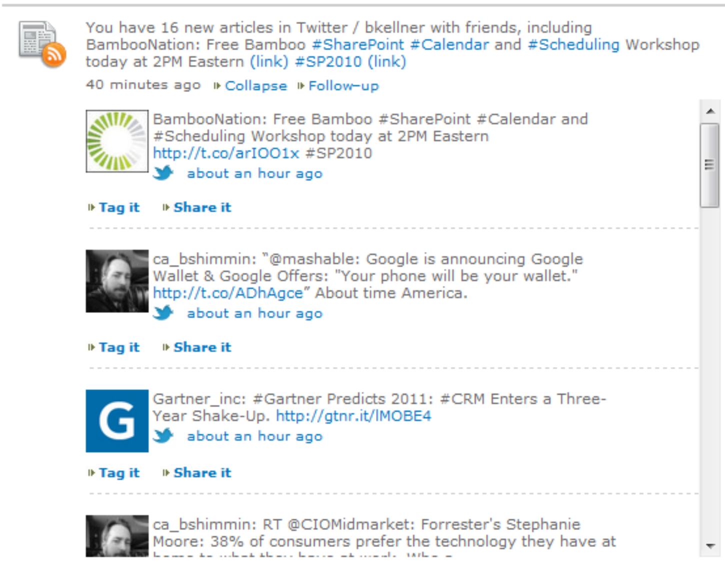

*Screenshot 518: Dynamics CRM Integration Setting*

If Dynamics CRM integration enabled is checked, end users has the Dynamics choice from their Edit Subscriptions menu. Server name should be what resolves 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.




*Screenshot 519: Twitter feed*

Once a user has integrated their Twitter account, they are able to tag and share their Twitter feed items within the Aurea 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.

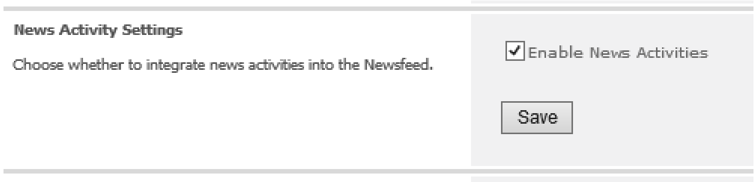
Unchecking the **Enable News Activities** setting removes both the options for stream display of articles, either by keyword matching or by direct subscription.

To eliminate just the direct subscriptions option, the **Allow Personal Subscriptions** option should be unchecked.

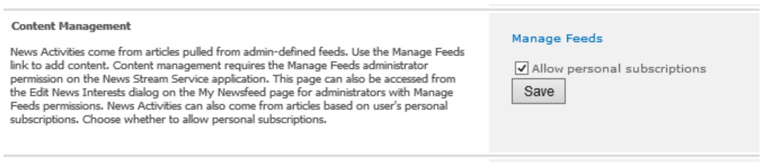
There are different levels to which users can be allowed to customize what articles and feeds they consume.

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.




*Screenshot 520: News Activity Settings*




*Screenshot 521: Content Management*

With both boxes checked (both Enable News Activities and Allow personal subscriptions), users 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 is matched to articles in the system feeds collection, and have synopses of these articles appear in their activity stream.

For information on how users can use these options subscription and keyword search options, see the Aurea Social v5.5 User Guide with Web Part Summary.

If in the Content Management section of the management page you uncheck the **Allow personal subscriptions** box and then click **Save**, people no longer see the Edit Subscriptions option (nor the Subscriptions tab in the Settings dialog), and therefore cannot 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 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 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 therefore can no longer enter keywords as news interests that brings synopses of matching stories into the **Activity Stream**.

## Aurea 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 is covered. Further, tile sets are needed to provide a filtered view for sanctioned organizational communications.

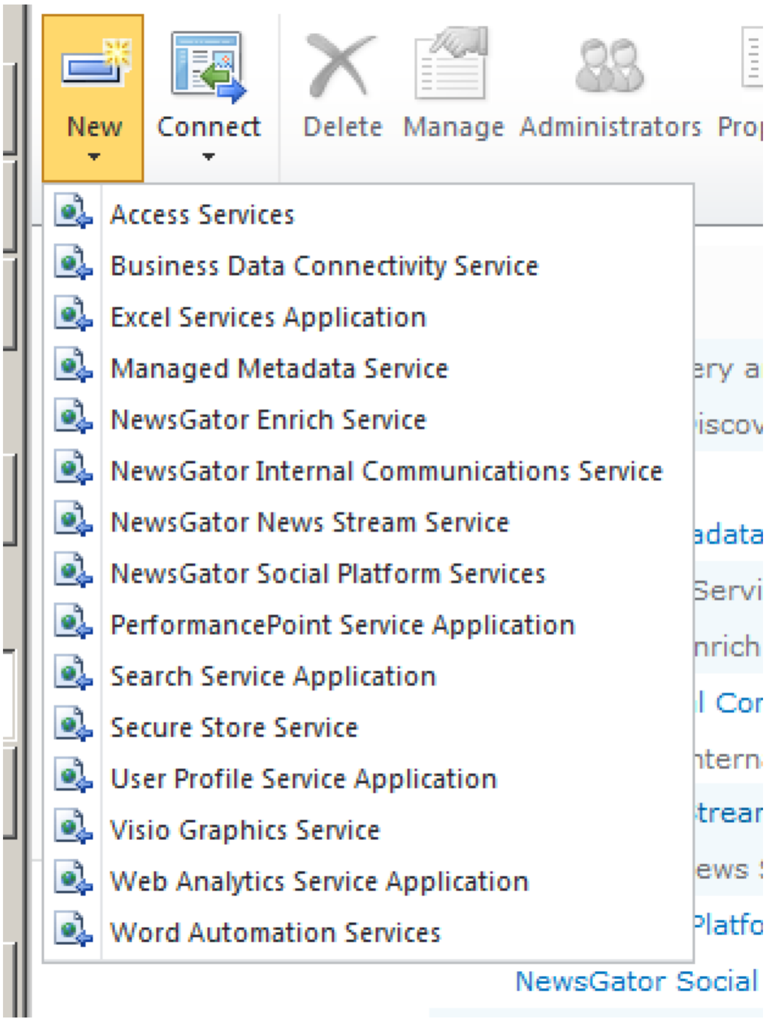
While you could roll out the bare minimum amount of configuration for the internal communications tile, we'll cover some best practices and considerations which should be taken into account when implementing this core feature. Lastly, we'll walk through the administrative console which is used by communications managers.

## Creating the Service Application

As of 4.1, the service application should be created by the installer. If you want to manually create the service application, do the following:

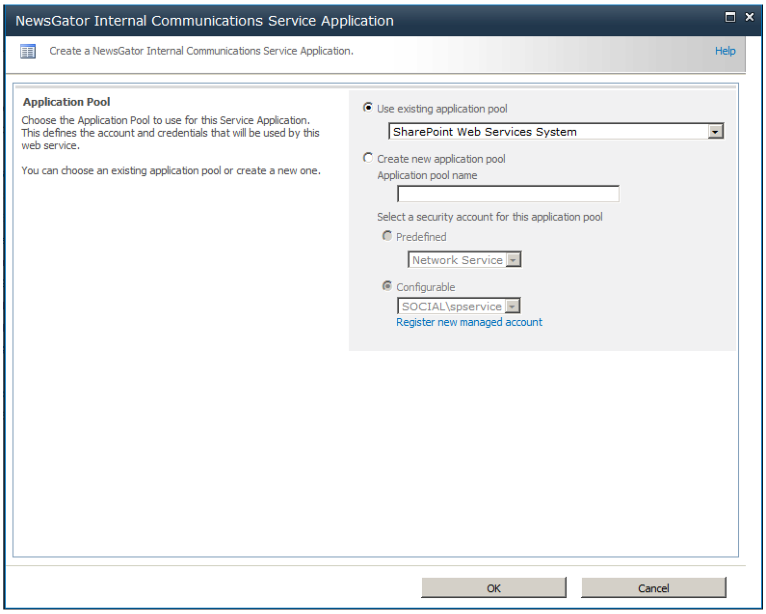
1. Log into SharePoint Central Administration and navigate to **Application Management > Manage Service Applications**.

2. Click the **New** button, and select **NewsGator Internal Communications Service**.




*Screenshot 522: Click New*

3. Configure the application pool and click **OK**




*Screenshot 523: Click OK*

4. Verify the service application was created.


*Screenshot 524: Service Application is 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 Aurea 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 Social Ribbon Control feature or remove them using jQuery.

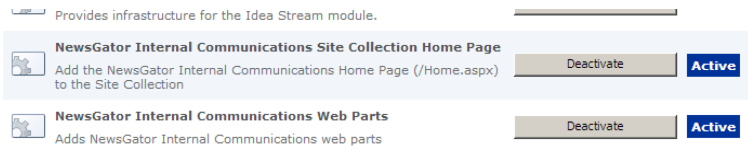
Each approach has it's considerations, and this document does not cover them as this is a function of SharePoint. Consult with NewsGator Professional Services to provide recommendations based on your organizations requirements.

## Deployment

1. Navigate to the site collection where the landing page is deployed.

2. Go to **Site Settings > Site Collection Features**.

3. Activate the **NewsGator Internal Communications Site Collection Home Page** feature.

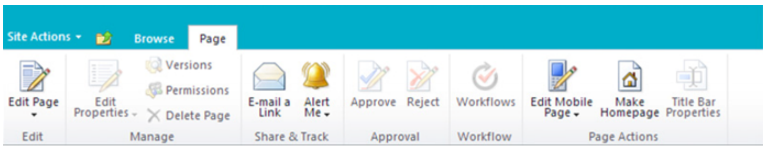



*Screenshot 525: Activate the NewsGator Internal Communications Site Collection Home Page*

> **Note:**
> The landing page does 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.




*Screenshot 526: Click page tab*

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 need to use the tools provided by this solution to help manage the impact and reach of their messaging. While the reach metric is never 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. 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 (for example, lunch.

» 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 clickthroughs

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 may 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 Aurea 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 Aurea 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 Aurea 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 Aurea 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 makes 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 is 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 has the ability to post. Additionally, read only does not mean that users cannot comment, like, etc. You need to lock the post to prevent commenting.

» **Disable Follower Controls**

It is highly recommended that you disable the ability to follow / leave a group that is 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 Aurea Social community discovery web parts.

#### Targeting with Blogs

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.

#### Additional considerations

If the intent is to create a community as read only (that is, 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 Aurea Social before manually changing database values.

### Tile sets

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.

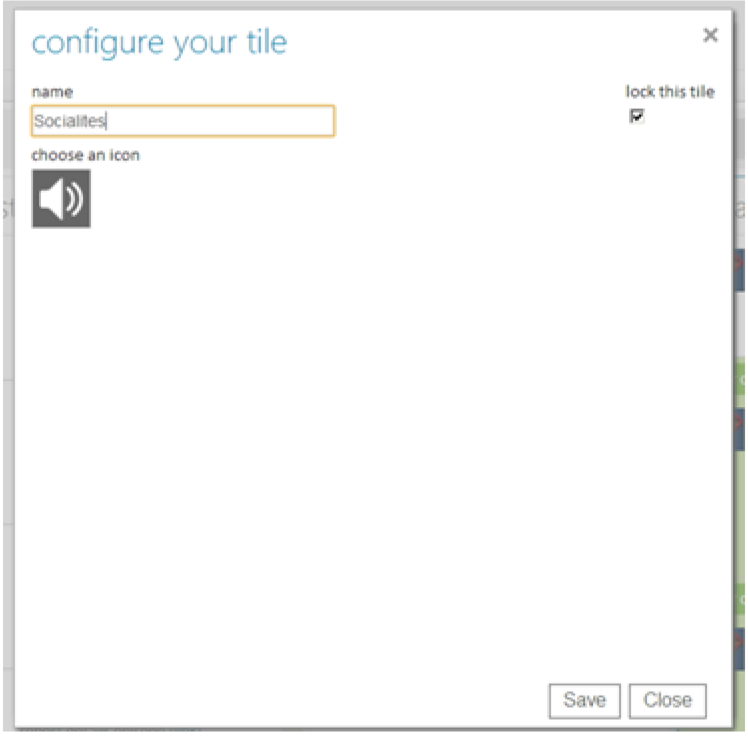
The most common ways to roll out tile sets is either by department, geography, or role. Any other dimensions are entirely possible, the key configuration to consider is having the appropriate SharePoint audiences to drive the assignment of tiles. Additionally, you may want to ensure that the approach 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 (that is, 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.




*Screenshot 527: Configure your tile*

## Best Practices

» You may 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 to use the console.

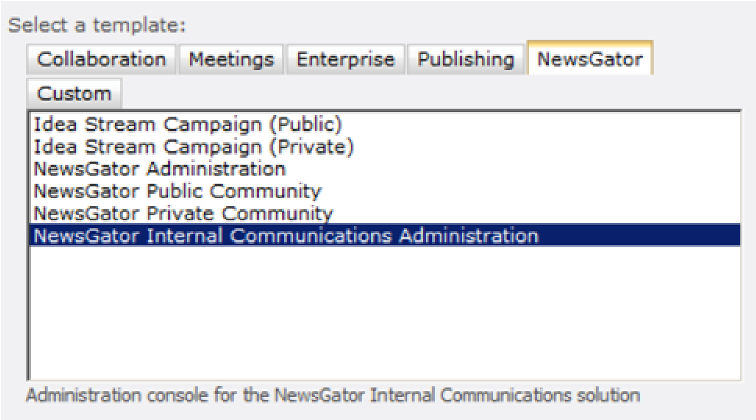
### Creating the Admin Console

Follow the below steps to create the admin console:

1. Log into **SharePoint Central Administration** and navigate to **Application Management > Create Site Collections**.

2. The site collection can live anywhere, so make sure you select the right web application and managed path according to your site architecture.

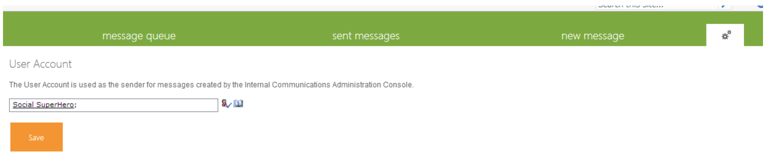
3. Enter a title for the site and, in the templates page, select the **NewsGator tab > NewsGator Internal Communications Administration** template.




*Screenshot 528: Select a template*

4. Set a site collection administrator and click **Ok**.

5. Navigate to the site collection once it's done provisioning, and select the settings tab (of the four tabs, it has the gear icon):




*Screenshot 529: Enter the persona account and click Save*

6. Enter the persona account which is used to publish messages through the console and click **Save**.

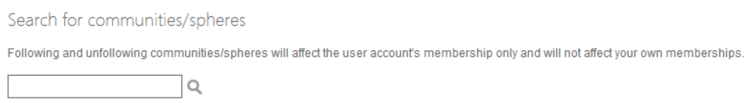
**Persona Account**

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 has 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.




*Screenshot 530: Type in search box to find communities/spheres*

Other Recommendations:

» The user display name should not be a normal name (that is, 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 is easily recognizable as corporate personality.

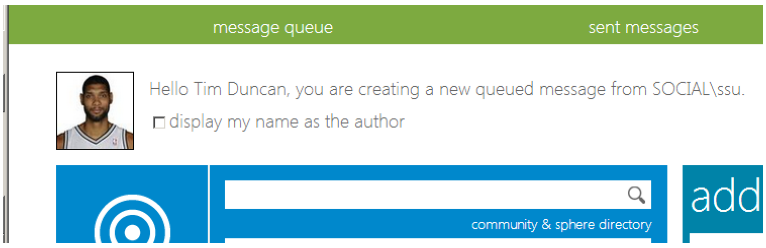
- A profile picture should be setup for this account in SharePoint. A corporate logo or mascot work great here.
- Add a description in this account's SharePoint profile to help users understand what the account is for.

#### New Message Page

The new message page is where communications managers compose and target 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.

- If you check the **display my name as the author** check-box, the post shows up as the currently logged in user.
- If you do not check this box, the persona account shows as the author.




*Screenshot 531: Check **display my name as the author** to display post as currently logged in user*

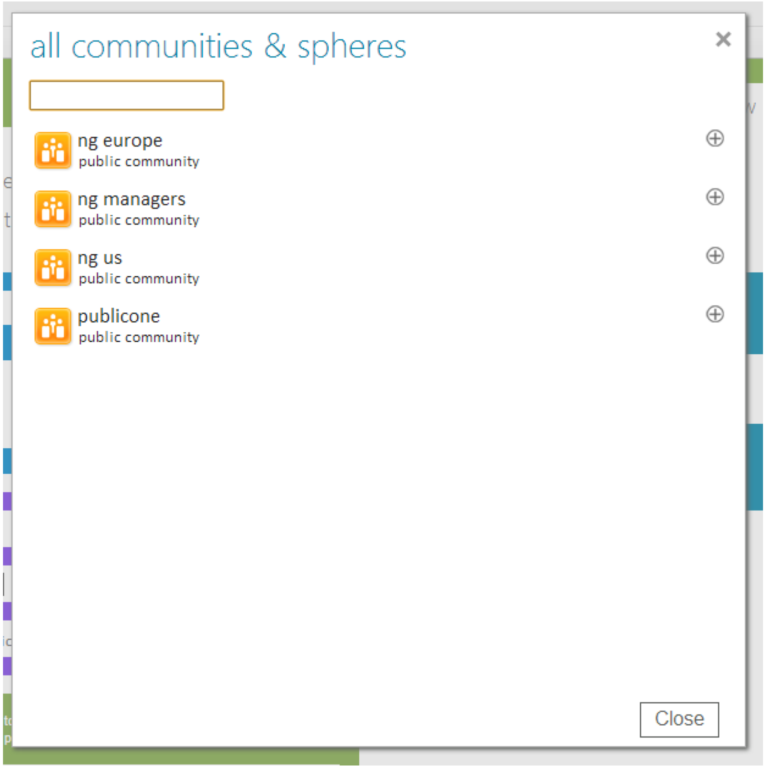
The target control is where communities can be targeted from for the new message. While you can also use `@ target` from the message box, only communities added to the target box counts for the reach metrics (that is, the potential distinct viewers of the message).

As you type into the search box, communities for the currently logged in user appears as auto-complete options. Hitting tab, enter, or clicking a suggestion with the mouse pointer adds 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.


*Screenshot 532: Target*

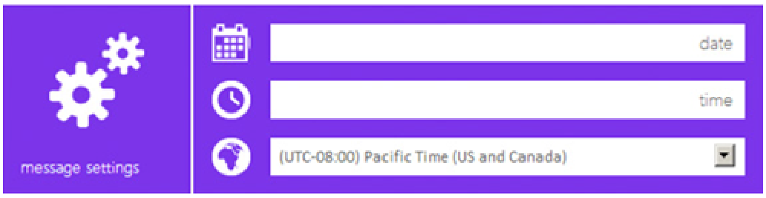
To get a list of all communities available for targeting, click the **community & sphere directory** link. This brings up a list of all public communities, as well as private communities the currently logged in user has access to. Communities can be added to the target list by clicking the **+** button, and removed by clicking the **-** button.




*Screenshot 533: List of communities*

> **Important:**
> 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 is 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.




*Screenshot 534: Message settings control*

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.

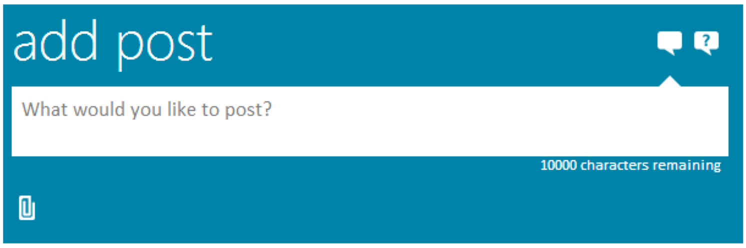

*Screenshot 535: Promoted post fields*

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 appears with a green background and has a “Promoted” banner at the top of the stream item.


*Screenshot 536: Click **X** to mute*

Clicking the **X** in the promoted banner mutes the post for the currently logged in user.




*Screenshot 537: Enter your message here*

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.

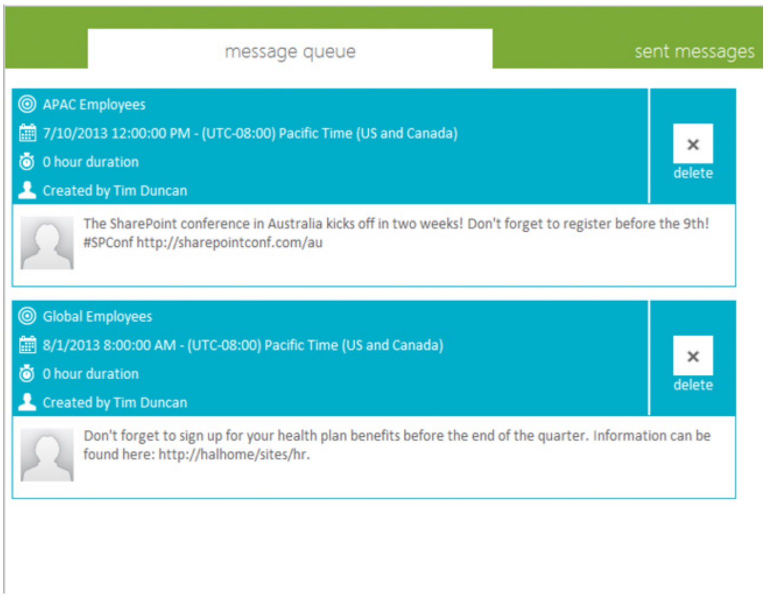
Enter your message into the message box.

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 appears in the post box should any private communities be targeted when attaching a file (as the file itself is publicly accessible) Once you are done entering your message, click the Save to Queue button. If all required fields are provided, a message displays confirming that it was added to the queue.

> **Additional Notes:**
> If you want to send the same message to multiple time zones, you need to enter the message once for each time zone. Likewise for posts that should be in multiple languages.

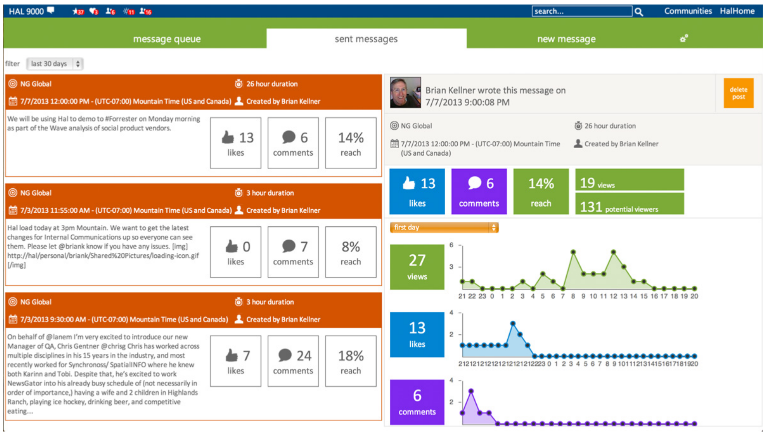
## Message Queue page




*Screenshot 538: Message Queue Page*

The **Message Queue** page shows all messages which are pending delivery, listed in chronological order (the next post to go out is the top item). Messages can be deleted from the queue by clicking the **Delete** button.

## Sent Messages page




*Screenshot 539: Sent message page*

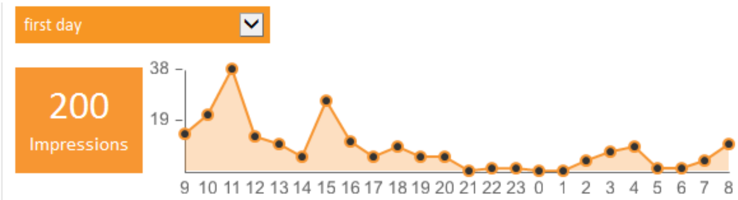
The sent messages page is for viewing the metrics for sent messages. Sent messages appear chronologically, with the most recently posted appearing at the top.

Clicking on any of these brings 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 does 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.




*Screenshot 540: Impressions metric*

You can delete posts 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 Aurea 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 Aurea 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 Skyvera 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 performs well with larger audiences as well as providing some specific tools to configure and run these sessions well.

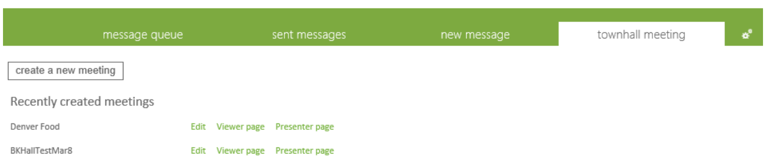
A **Townhall Meeting** happens on a lightweight meeting page that can be configured by non-technical staff without need for SharePoint permissions.

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 is used as the "home" for the stream and the content. This keeps the benefits of having the posts in the stream and a logical place to store content. The meeting administrator configures a townhall meeting page (detailed below) and publicize the link to that page.

When the meeting happens, users participate on a lightweight page and the meeting administrators and speakers have a separate meeting management page. If a user attempts to visit the community page while a townhall meeting is running, she is 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.

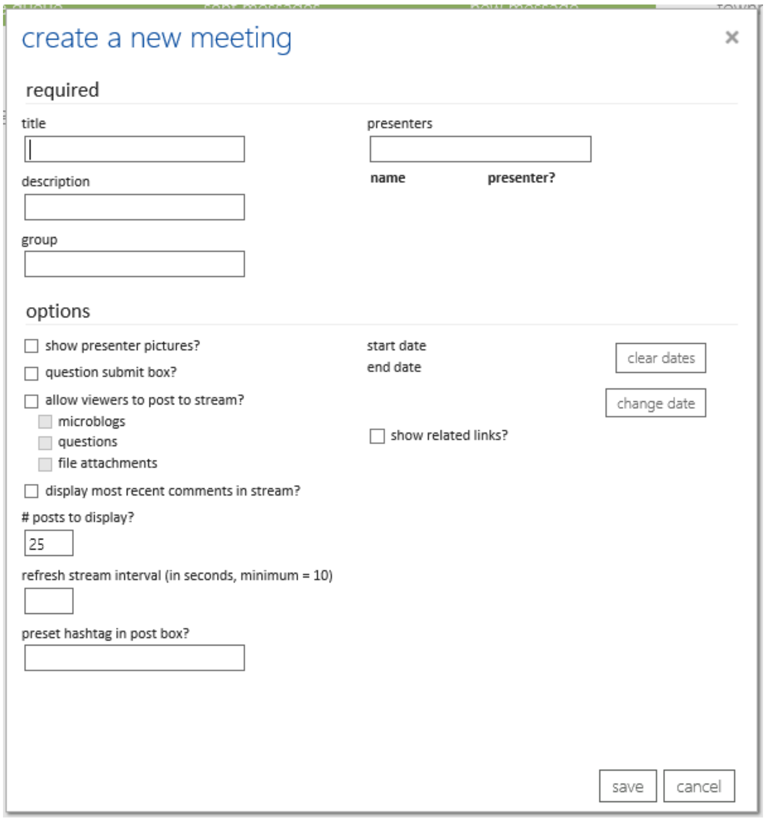



*Screenshot 541: Townhall Meeting*

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.


*Screenshot 542: Manage Meetings link*

Selecting the **create a new meeting** option presents a dialog box.




*Screenshot 543: Creating a new meeting*

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 is visible in this community or sphere after the meeting has ended.

The presenters section allows you to choose the people who has access to the presenter page.


*Screenshot 544: Presenters section*

The presenter checkbox indicates a person whose picture can be shown on the viewer page.

In the **options** section, the show presenter pictures choice causes 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 makes 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 automatically updates 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.

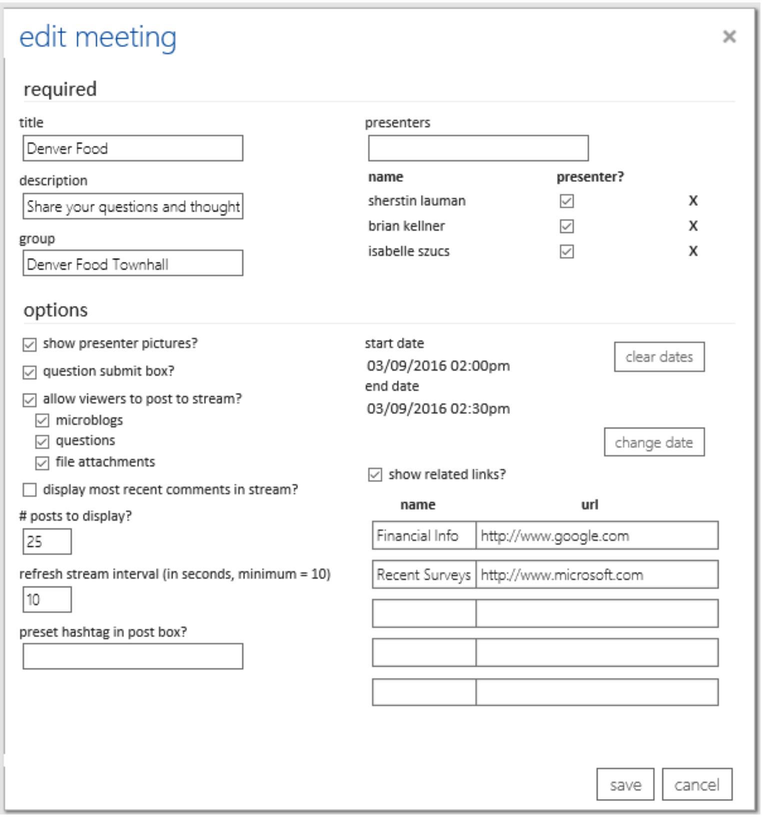
Start and end date and times are used for redirecting users who are visiting the community during the time of the meeting to send them to the lightweight townhall meeting page.

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.

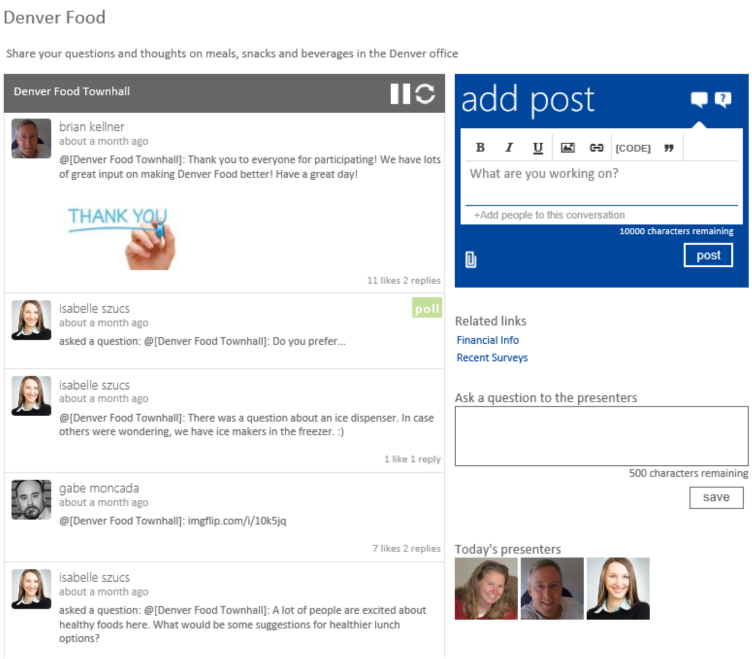
You can change the settings for a meeting at any time. If you change the settings during a meeting, users needs to reload the page to be able to see the results.

Below is an example of fully defined meeting.




*Screenshot 545: edit meeting*

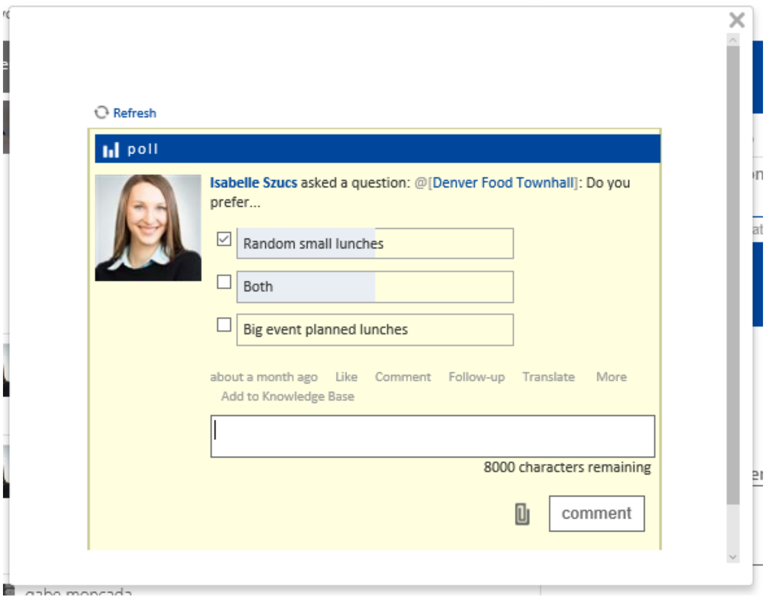
With these settings, the Viewer's page looks like this.




*Screenshot 546: Viewer's page*

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.

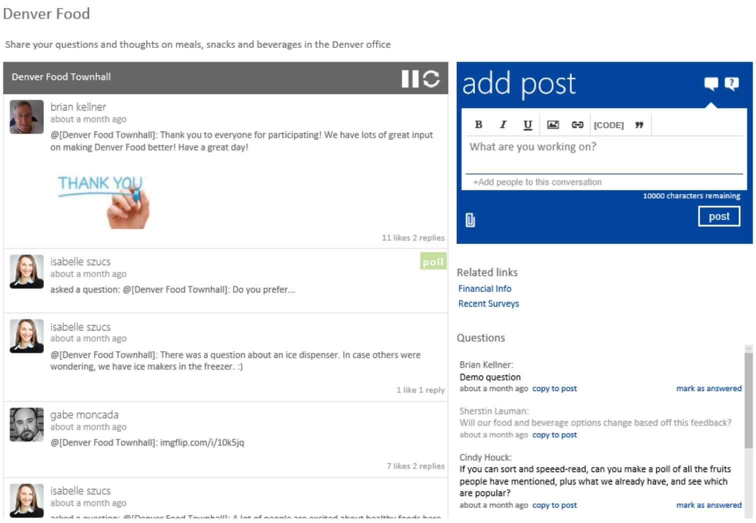
When a viewer clicks on stream item (a poll in the example below), a pop up view of that item with all the text and comments is displayed.




*Screenshot 547: Stream item*

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.



*Screenshot 548: Presenter page*

Presenters 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.

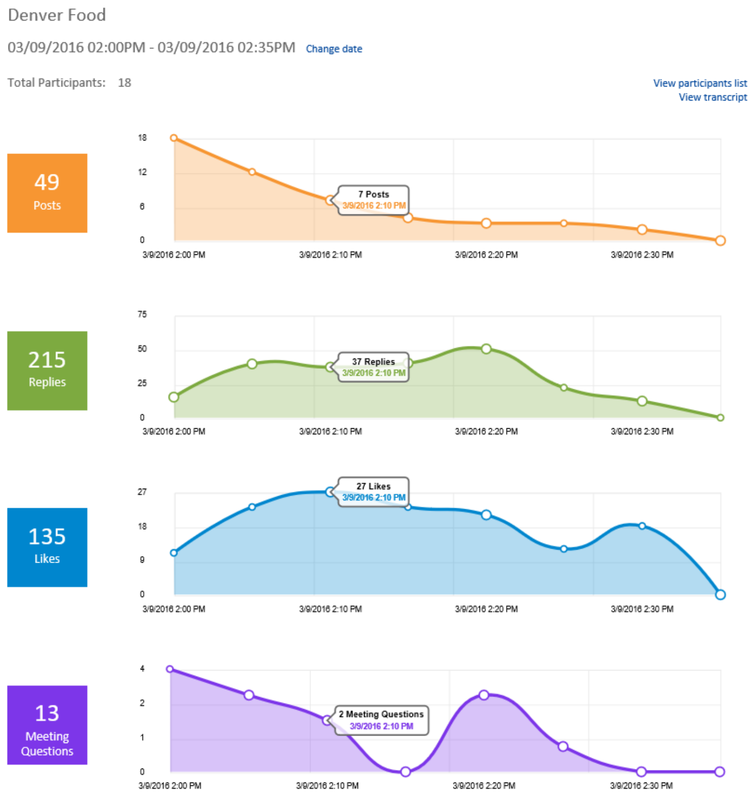
From the presenter page, there is also a link to the "view post-event summary" page detailed below. Clicking this link prompts for the start and end time for your report.

*Screenshot 549: Enter dates to view townhall summary*

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.




*Screenshot 550: Summary view page*

At the bottom of the summary page, the most active participants in a few categories are highlighted.

| 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 |

*Screenshot 551: Most active participants*

This can be helpful if you to reward certain behavior (e.g. give a prize to three people who replied the most).

## Aurea Social Idea Stream

## Overview

Idea Stream is an optional Aurea Social module supporting the crowdsourcing of ideas. Aurea 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.

### 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**

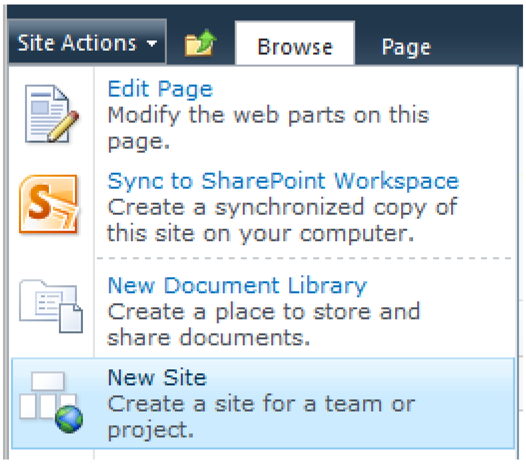
### Campaign Creation from a Community

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.

You can do this from the community site.

1. Go to **Site Actions -> New Site**.




*Screenshot 552: Click **New Site***

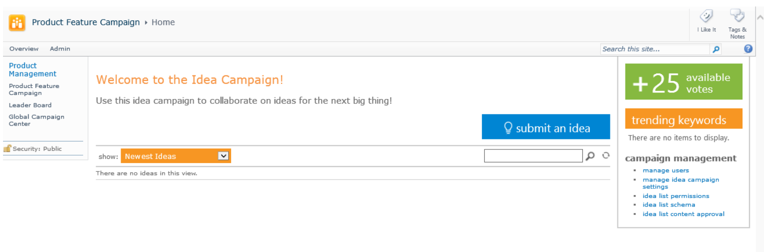
2. For a public community, choose the public campaign site definition.


*Screenshot 553: Click Create*

3. Click **Create**.

The campaign sub-site is created and it is automatically joined to the parent community. The campaign automatically defaults to “marketplace mode”

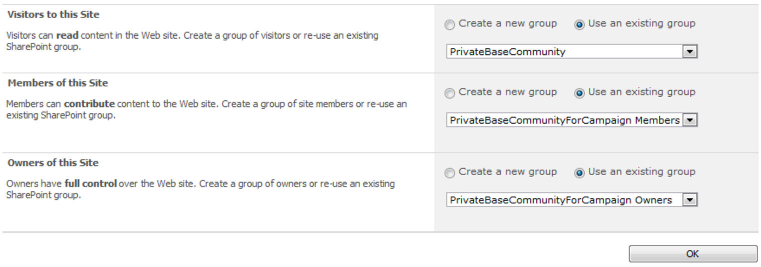
For further details, see Campaign Modes .




*Screenshot 554: Campaign sub-site created*

Administrators have access to the campaign management links.

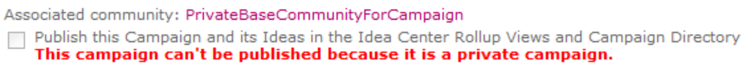
> **Note:**
> If you are creating a campaign to be part of a private community, you should select the Private Campaign site definition. This will bring you to a screen where you can confirm that you want to use the same viewer and contributor groups as the parent community.




*Screenshot 555: Click Ok*

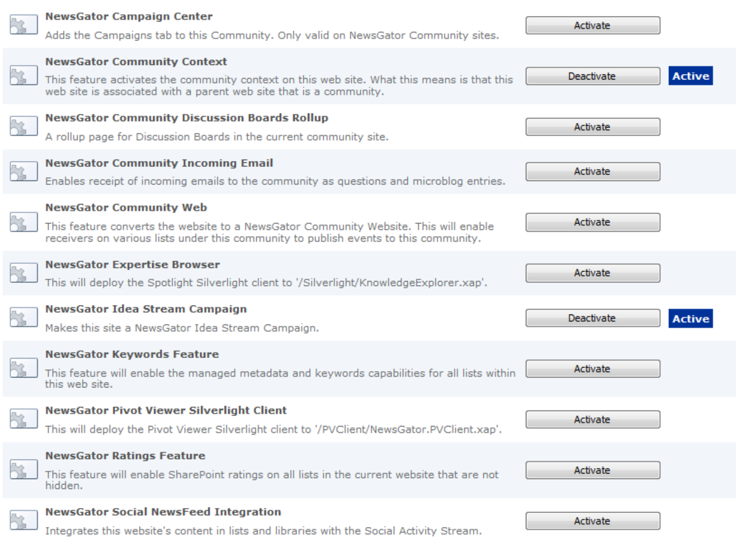
Clicking **OK** takes the admin to the same campaign starting page as shown above in the public campaign creation flow.

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.




*Screenshot 556: Private campaigns cannot be published to the global directory of campaigns*

From the site settings (manage site features) page, it's easy to see that two features are automatically activated for this site.




*Screenshot 557: Manage site features*

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.

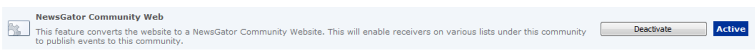
## Standalone campaign creation

Campaigns can also be created in a standalone mode (not as part of a community). To do this,

1. Create the campaign from a site or site collection that is not a community.

2. 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),

3. Activate the **NewsGator Community Web** feature.




*Screenshot 558: Activate community*

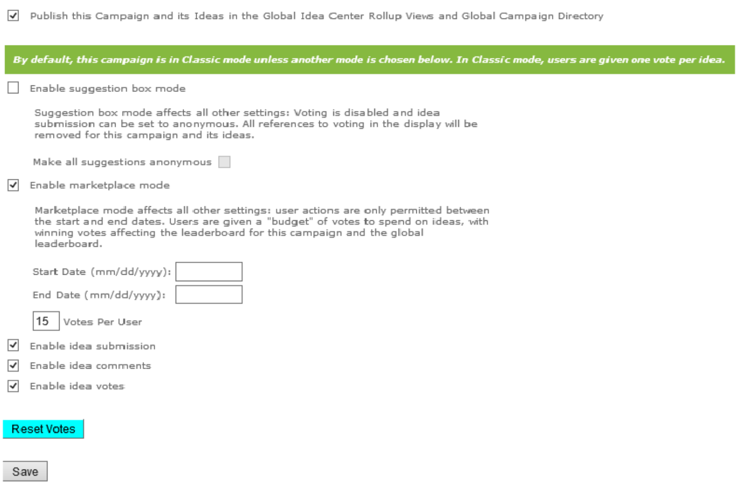
**Campaign Modes**

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.




*Screenshot 559: Manage idea campaign settings page where marketplace mode is enabled and configured.*

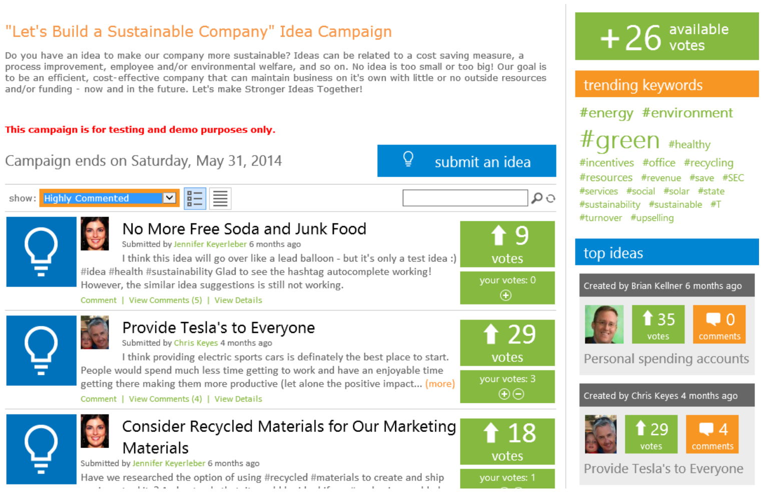
Start date, end date and votes per user only apply if marketplace mode is selected. If a start date is specified, no actions (submitting, voting or commenting on ideas) can be done until the start date is reached. If an end date is specified, no actions can be taken after the end date is reached.

> **Note:**
> 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 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 requires many clicks for users to cast all the votes.

The number of votes per user should not be changed once the campaign starts.




*Screenshot 560: Sample marketplace mode campaign that grants 26 votes per user, has started but hasn't reached the end date yet*

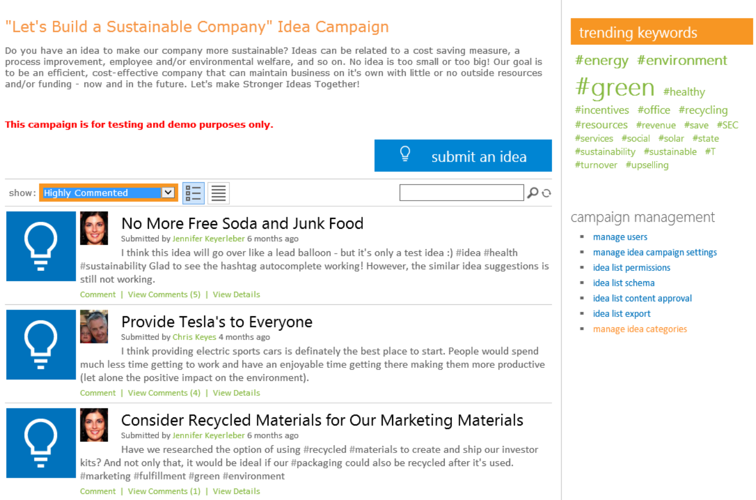
## Suggestion Box mode

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.

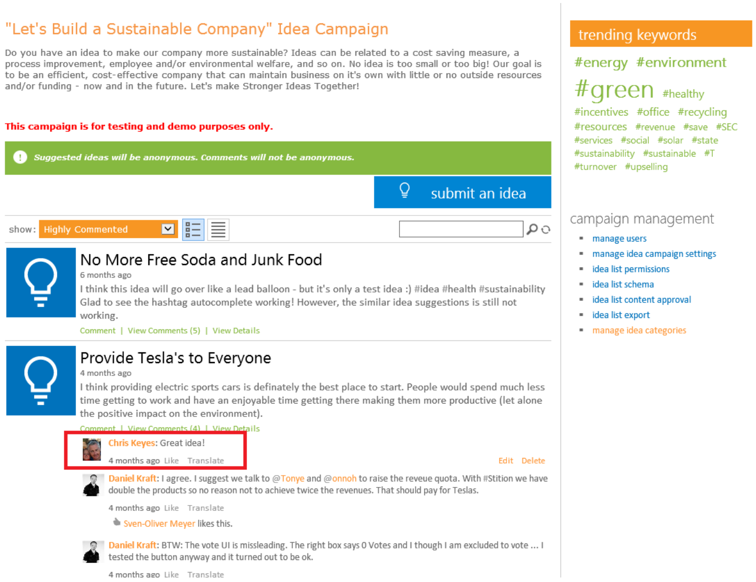
Click on **Make all suggestions anonymous** ensures that the identity of the submitter is not revealed.

> **Note:**
> Comments on ideas in anonymous mode are NOT anonymous.



*Screenshot 561: An example of a campaign with suggestion box mode turned on*

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):



*Screenshot 562: A campaign with an anonymous suggestion box enabled*

## 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.

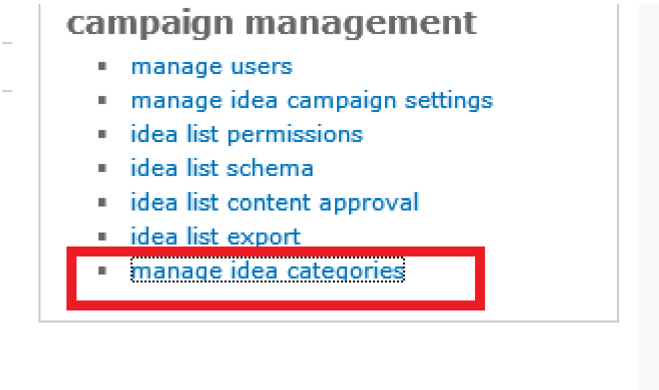
**Idea Categories**

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, do the following:

1. Go to **Campaign Management > Manage Idea Categories**:

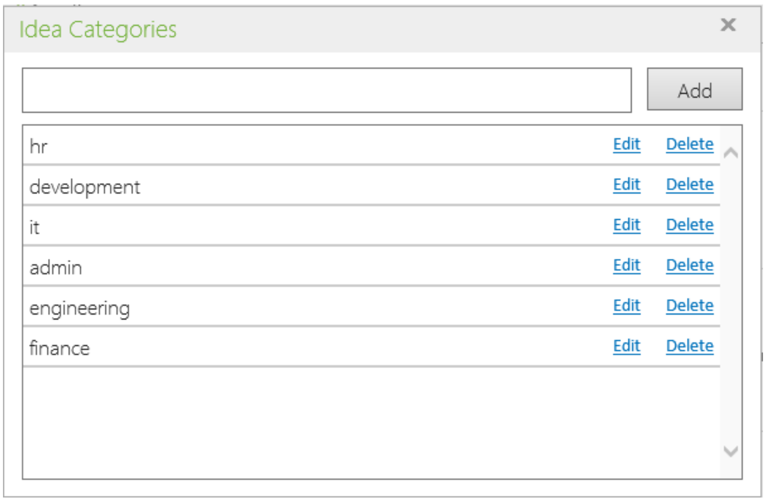



*Screenshot 563: Click Manage Idea Categories*

2. **Idea Categories** panel appears. For each required category, type in a category name and click **Add**.

3. Close the **Idea Categories** window when done.

> **Note:**
> This panel can be used to edit and delete categories. Be sure to remove all references to a category before deleting it.



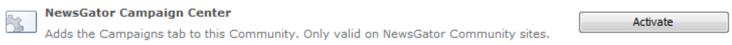

*Screenshot 564: Idea Categories*

**Campaign Rollup Pages**

Frequently a company runs multiple campaigns at the same time. Even individual communities could be running multiple campaigns.

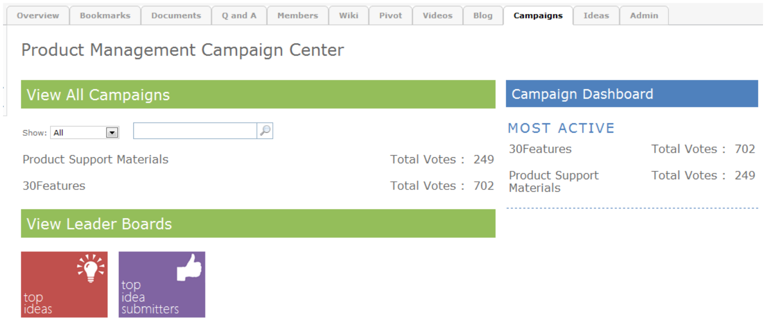
The rollup pages serve two primary functions: they provide an easy way to discover campaigns that are running, and they show leaderboards for ideas and idea submitters.

At a community level, the rollup page is enabled by activating a site feature.




*Screenshot 565: Click Activate to enable rollup page*

The NewsGator Campaign Center feature adds a **Campaign** tab to the community.

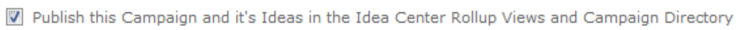



*Screenshot 566: Campaigns tab added to the community*

#### Global rollup page

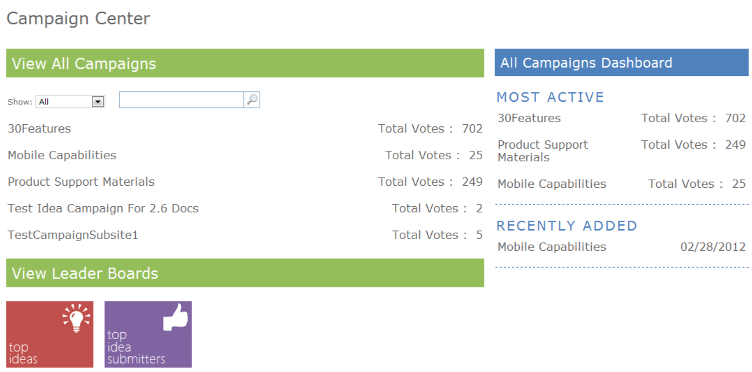
A global campaign rollup page is automatically deployed to `http://[ServerName]/_layouts/ng/idea/ideacenter.aspx`

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.




*Screenshot 567: 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.

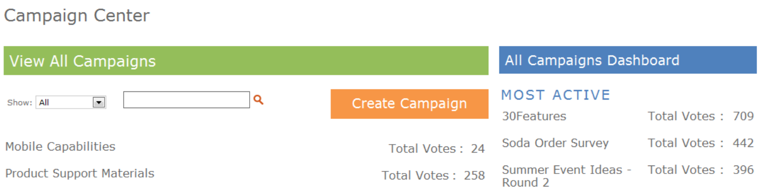



*Screenshot 568: Campaign Center*

> **Note:**
> 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.

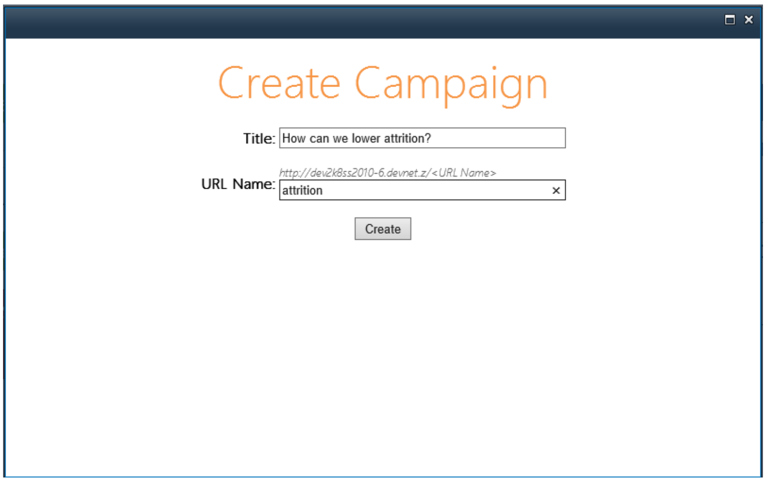



*Screenshot 569: Click Create Campaign*

Only users who have the rights to create a site can see the create campaign button.

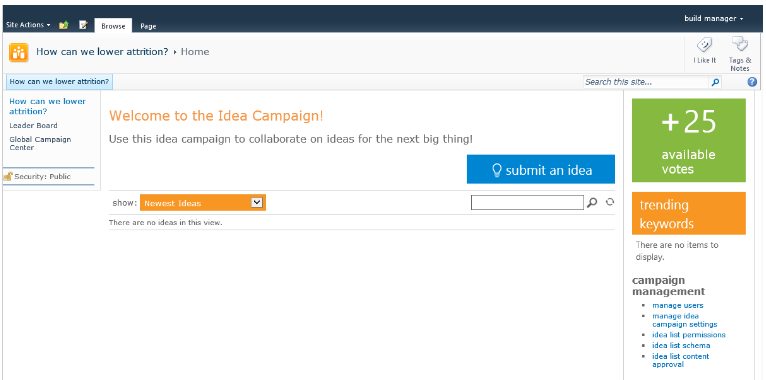
1. Go to **Site Actions -> New Site**.

2. Click the create button to open a dialog that allows entering a title and URL.




*Screenshot 570: Create Campaign page*

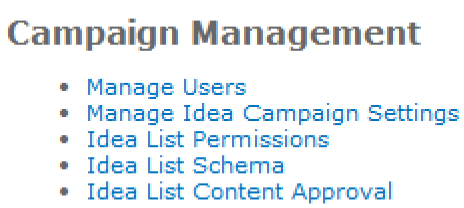
3. Click **Create**. The campaign is created and the home page of the campaign site is displayed.




*Screenshot 571: Home page of the campaign site*

**Campaign Configuration and Operation**

The admin has access to a set of campaign management links which is not visible to end users.

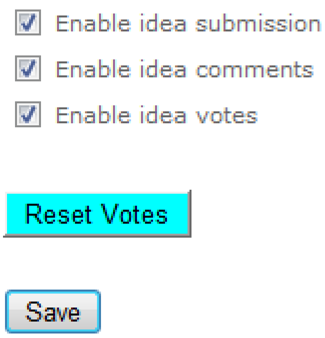



*Screenshot 572: Campaign management links*

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. 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 does not matter – the campaign is closed.




*Screenshot 573: Enable checkbox and click Save*

In many campaigns, idea submission is enabled first with voting disabled. This allows open brainstorming before a review is performed to assess which of the suggestions are viable enough to be included in the voting phase.

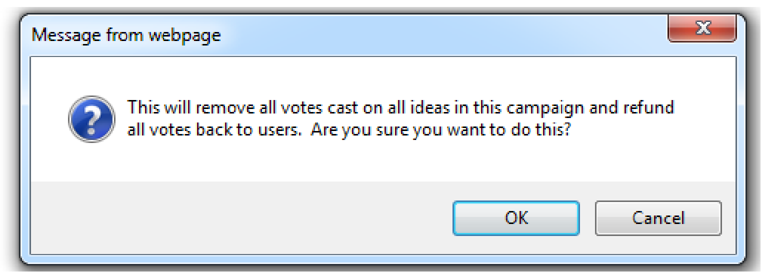
Once voting is opened, new idea submission can be shut down. Turning off capabilities changes the status message on the front of the campaign as well as disabling functions such as voting and commenting from being performed in the Activity Stream.

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).

To reset votes,

1. Click the **Reset Votes** button. A confirmation dialog is displayed.



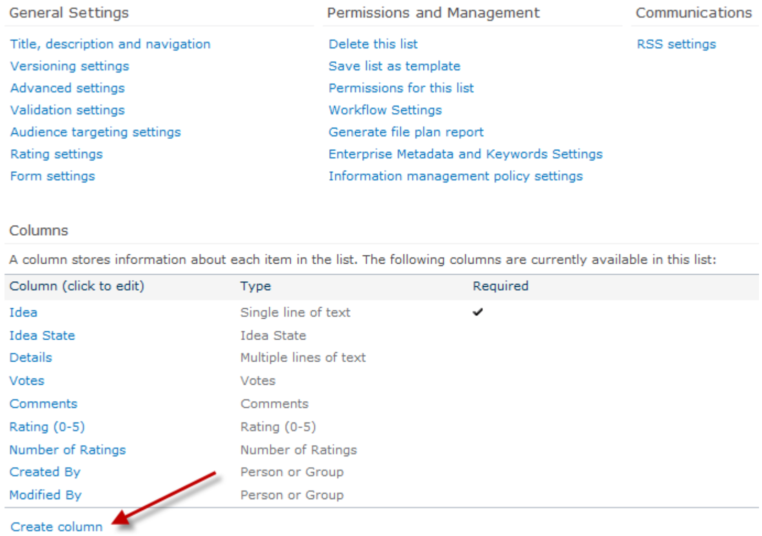

*Screenshot 574: Confirmation dialog is displayed*

2. Click **OK** 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 lets 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**.

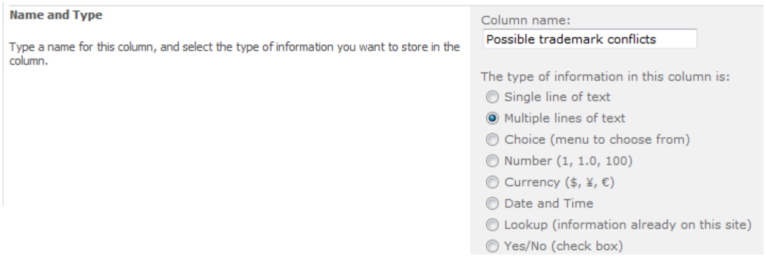
To add new fields to collect with each idea, click the **Create Column** link.




*Screenshot 575: Click Create column link to open a form where you can define the new column*

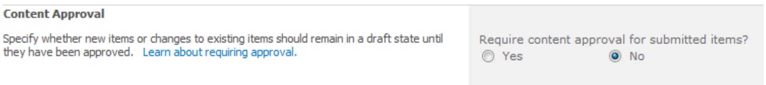
Adding columns, along with everything else on this page, is standard SharePoint functionality.

When the admin clicks the **Create column** link, a form displays to allow definition of the new column.




*Screenshot 576: 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.



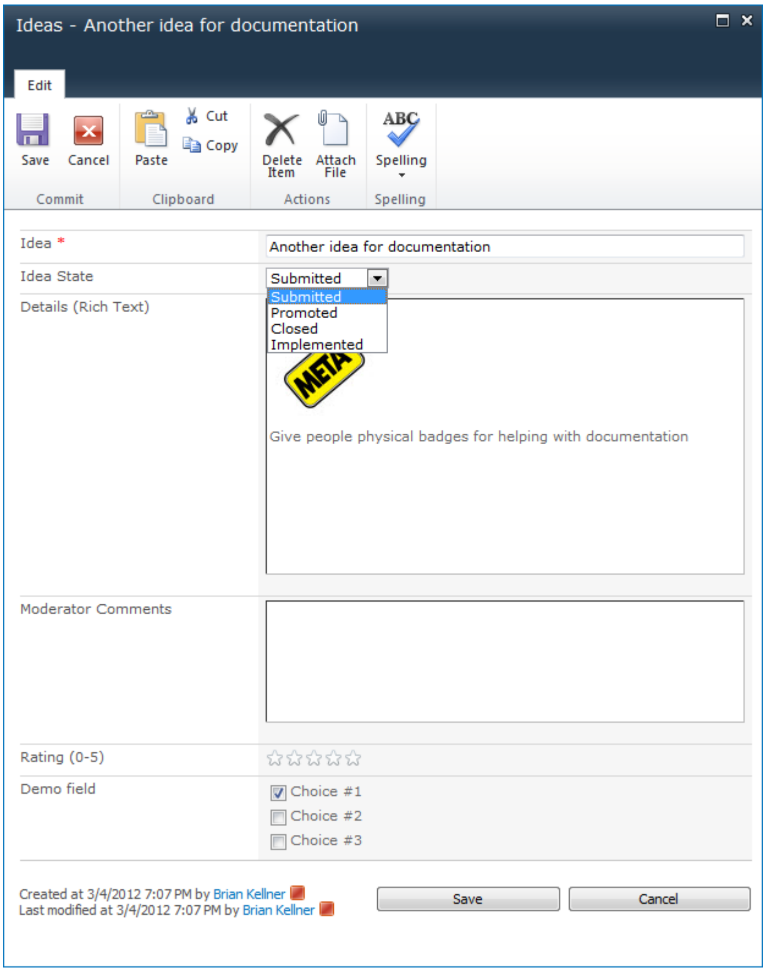

*Screenshot 577: Content Approval*

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 typically accesses the list view for filtering, sorting, and editing ideas.

Administrators can change ideas between statuses (for example, 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.




*Screenshot 578: Change idea status*

Changing the idea to promoted, closed or implemented prevents 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 is considered for the next stage. Implemented is used to represent that an idea was carried through to completion.

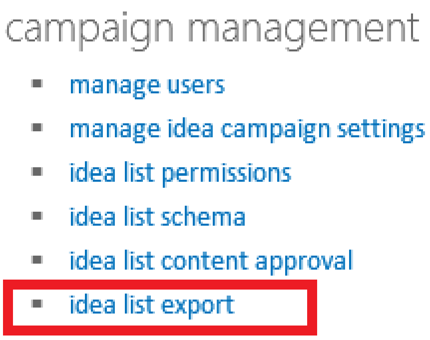
#### Closing the Campaign

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

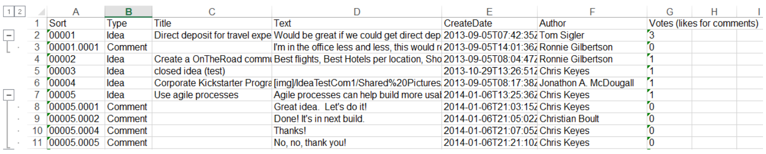
Ideas with comments for a given campaign can be exported into a Microsoft Office Excel format. The export creates one row per idea and one row per comment under the corresponding idea.

To perform the export, go to **Campaign Management > Idea List Export**.




*Screenshot 579: Click Idea List Export*

The Idea List Export creates a file called `IdeaExport.xls`. Here is an example:



| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 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 usal | 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 |

*Screenshot 580: IdeaExport.xls file*

## Aurea Social innovation solution

### Overview

The Innovation Solution is an optional and separate offering from the Aurea 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

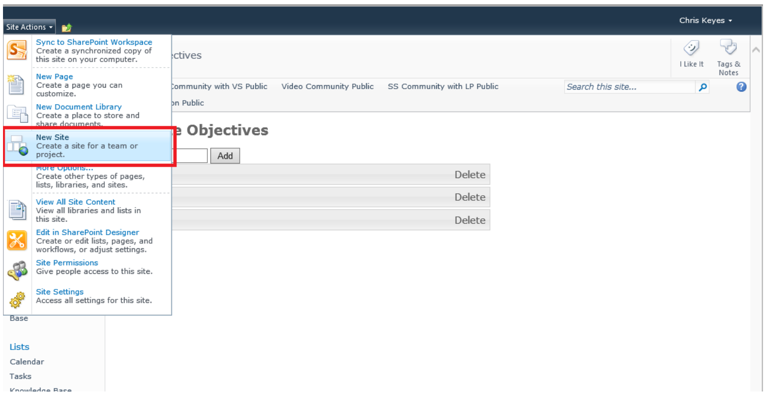
Ideas can be implemented through Innovation labs.

#### Creating an Innovation Lab

**SharePoint 2010**

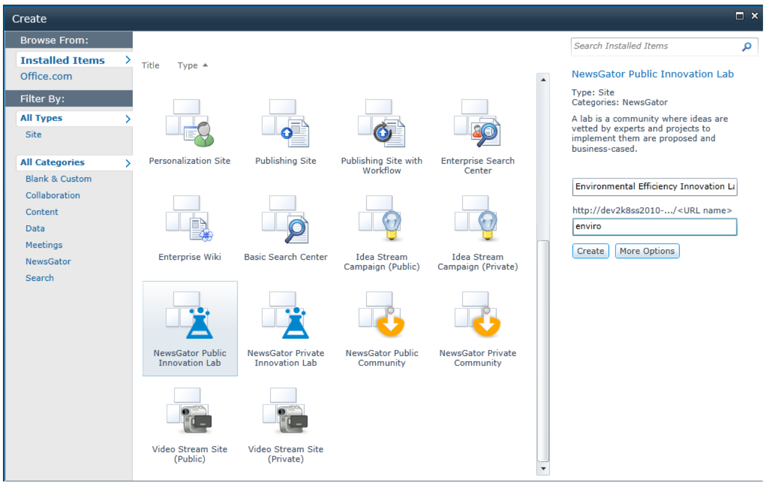
Creating an Innovation Lab is like creating any other Aurea Social community.

1. Go to the **Site Actions** menu and click on **New Site**.



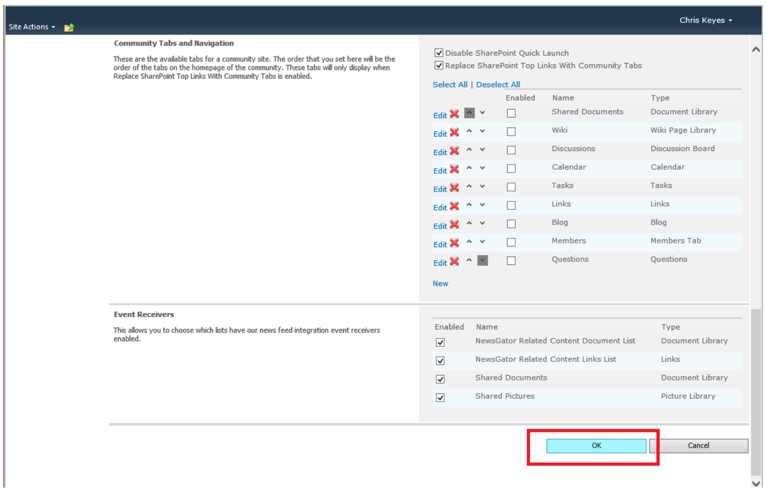
*Screenshot 581: Click New Site*

2. Select the Innovation Lab template, specify a name for the lab and a relative URL as seen below:



*Screenshot 582: Select template*

3. Configure the Lab as you would a regular Aurea Social community and click on **Ok** when done.

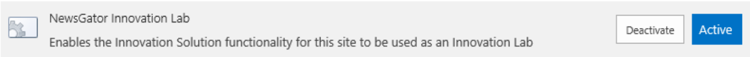


*Screenshot 583: Click OK*

When the creation process completes, you are 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**):

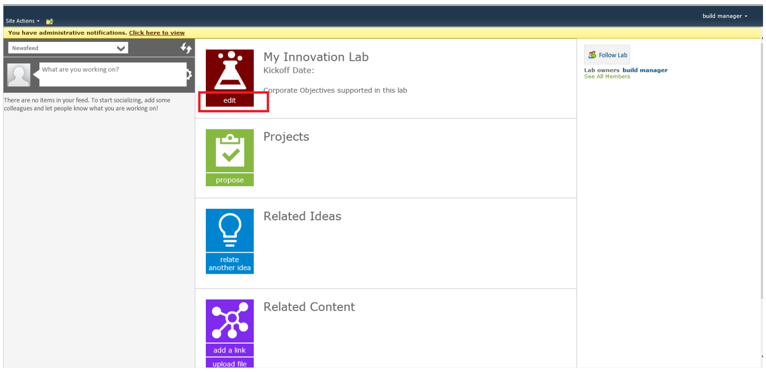



*Screenshot 584: Click Active*

## Configuring an Innovation Lab

After a Lab is created there are additional items to be configured to finish the setup. See below steps:

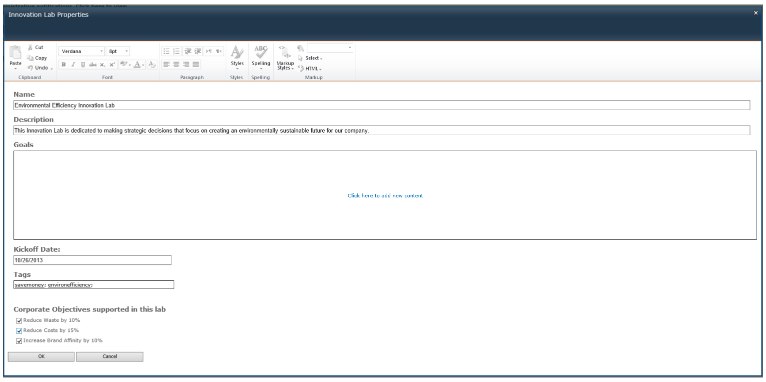
1. Click on **Edit** in the top middle box to do so. Here you can enter the Lab description, goals, and corporate objectives. These details inform Lab visitors about the purpose of this Lab and the corporate objectives it is supporting.




*Screenshot 585: Click edit*

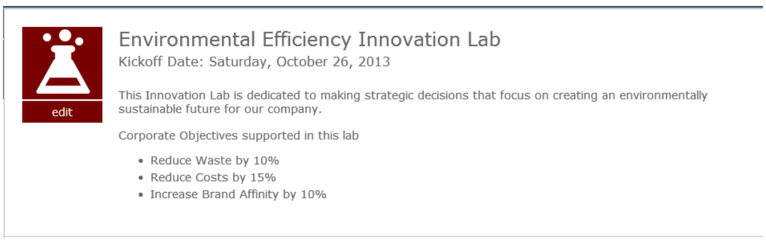
2. Fill in the **Goals**, **Kickoff Date**, and **Tags**. Select the relevant corporate objective.

3. Click **Ok**.




*Screenshot 586: Specify fields and click OK*

This is what the Lab properties should look like:




*Screenshot 587: Lab properties*

## Other Administration

A lab is specialized Aurea Social community with a similar set of administrative features.

To get to the community administration is similar to a regular community, that is, **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

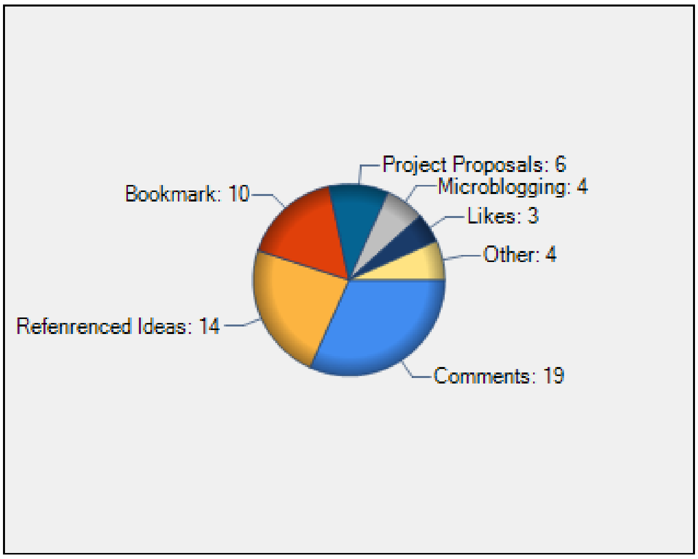
Most Active Users over the past 90 days

| Name | Events |
|---|---|
| Jennifer Keyerleber | 26 |
| Chris Keyes | 10 |
| Chris Keyes | 7 |
| Nate Hollingsworth | 4 |
| Brian Kellner | 3 |

Page 1 of 3

## Activity By Type

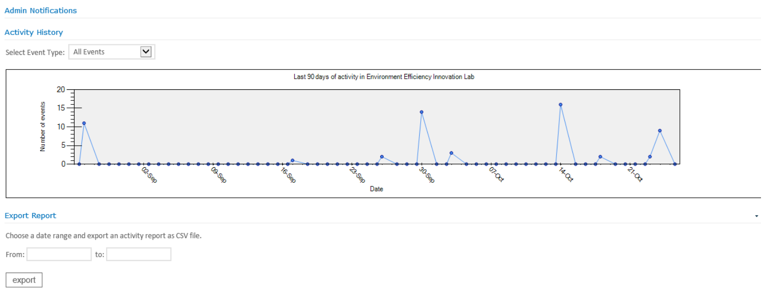
Activity by type in the last 90 days in Environment Efficiency Innovation Lab




**Other:**

Microblog Questions: 2 Documents: 1 Pictures: 1

*Screenshot 588: Admin links*




*Screenshot 589: Admin Notifications*

## Specifying Experts

Experts play a key role in an Innovation Lab as they vet and analyze the viability of the project proposals initiated within the Lab.

Sponsors approve and fund project proposals in order to continue the execution process.

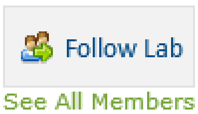
A Lab Manager can easily designate users as **Experts** and **Sponsors** using the **Members console** (click on **See All Members** under Follow Lab button) and checking the appropriate roles.

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).

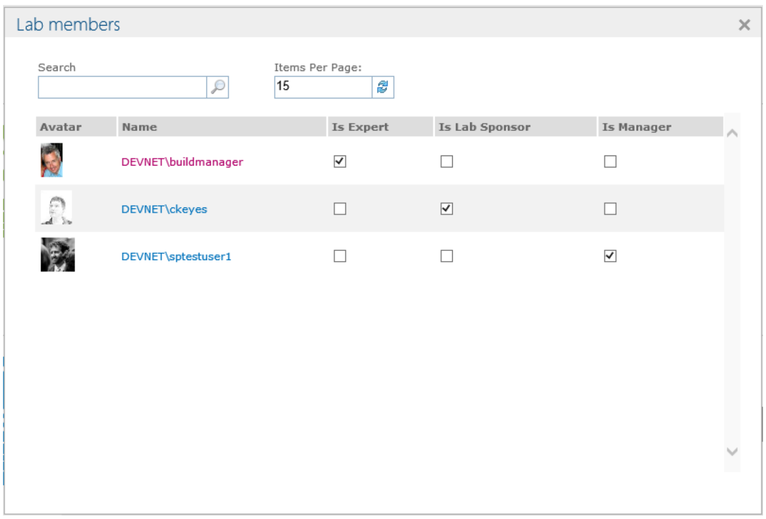
By default, Lab Managers, Sponsors, and Experts have permission to relate ideas to the Lab, propose projects, and launch proposals into stand alone projects.

Only Lab Managers and Sponsors can edit the Lab properties.

For further details on roles, see the Lab Roles and Permissions section in the topic Administering the process.

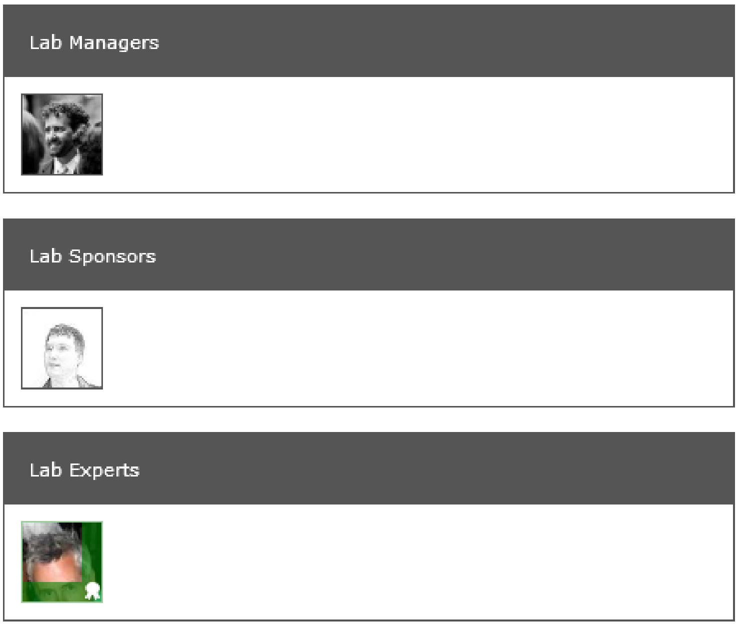



*Screenshot 590: Click **See All Members***




*Screenshot 591: Lab members*

After closing the window, the changes are reflected on the Lab page.




*Screenshot 592: Changes reflected on Lab page*

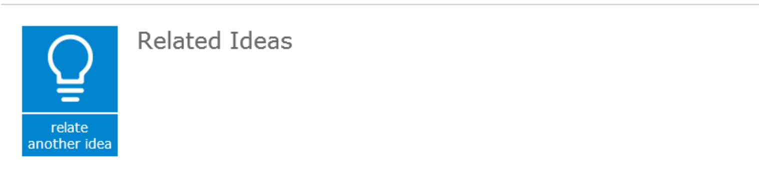
**Relating Ideas into an Innovation Lab**

## 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.

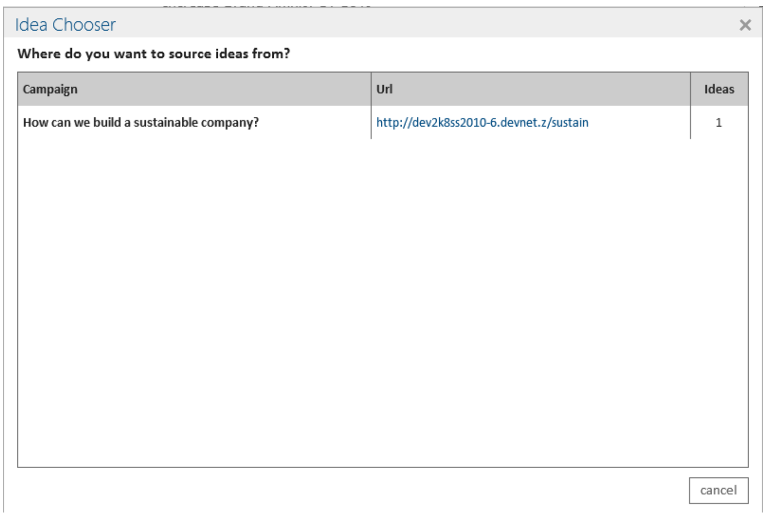
To relate an idea to a Lab, do the following:

1. Go to the **Related Ideas** area in the bottom right corner of the main Lab page and click **Relate Another Idea**.



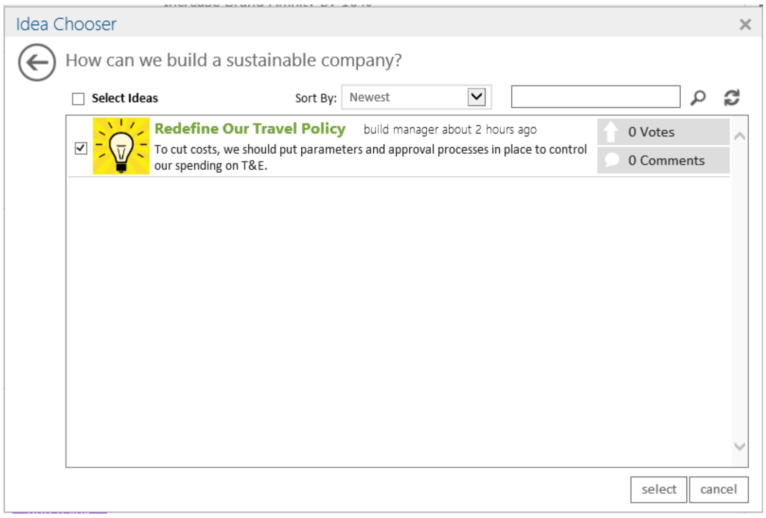

*Screenshot 593: Related Ideas*

2. When the **Idea Chooser** pops-up, select the idea campaign where you want to source existing ideas.



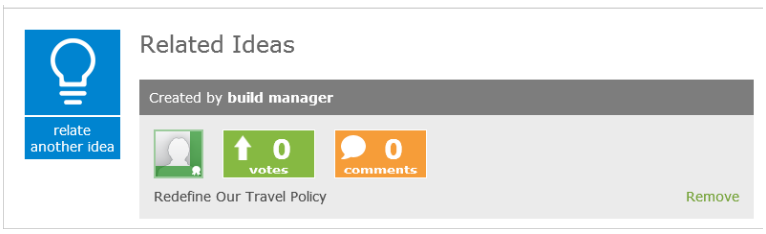

*Screenshot 594: Idea Chooser*

3. Select the ideas you want to relate into the Lab and click **Select**.



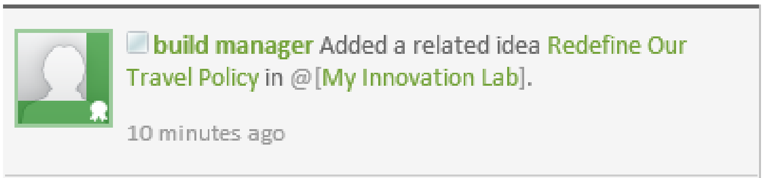

*Screenshot 595: Select the ideas*

4. The selected ideas now appears in the Lab.




*Screenshot 596: Selected ideas appear 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.



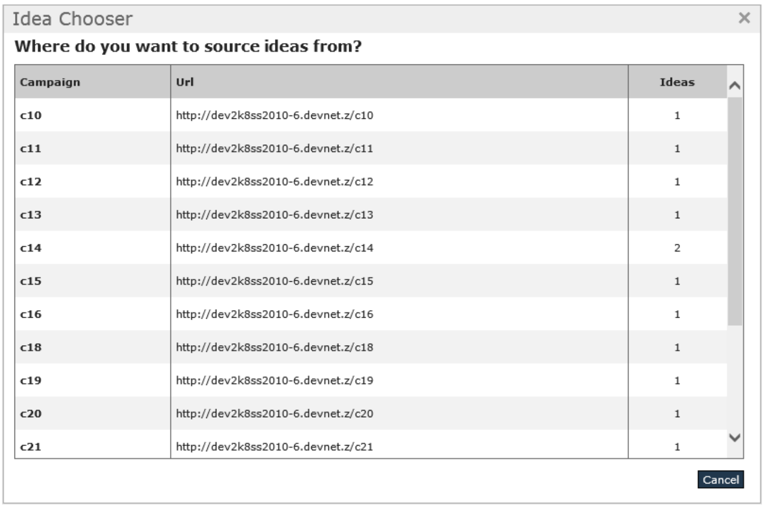

*Screenshot 597: Original idea pop-up*

## 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**.


*Screenshot 598: Idea Navigator*

1. Click on the **Idea Chooser**. A console pops up prompting you with the list of **Idea Campaigns and Communities** that have ideas.

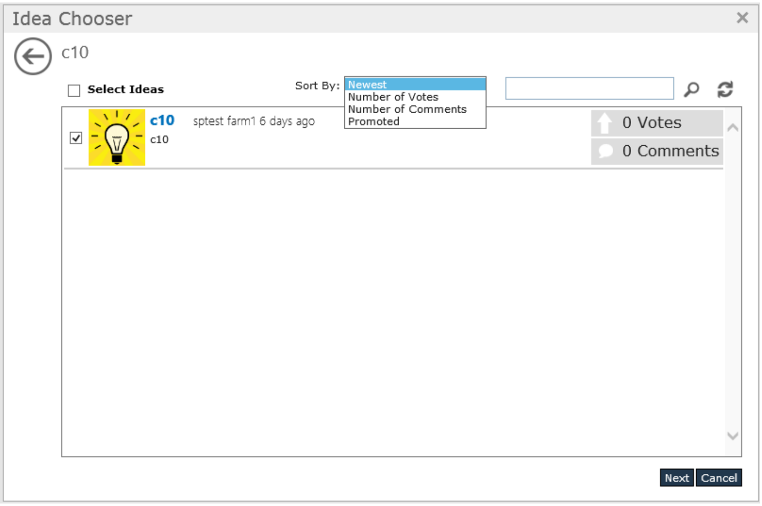



*Screenshot 599: Click on idea chooser*

2. Select an **Idea Campaign** or **Community**.

3. Now, select the ideas you would like to associate with a lab.

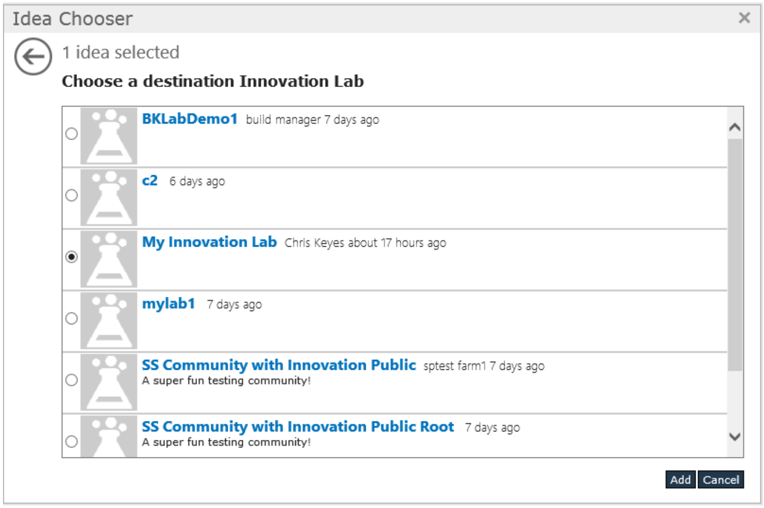
To help with the selection process, ideas can be sorted by recency, the number of comments, the number of votes, or be filtered to show only those ideas that have been promoted. Ideas for the selected **Community** or **Idea Campaign** can also be filtered by keyword.




*Screenshot 600: Idea Chooser*

4. Click **Next**. Lab selection window is displayed.

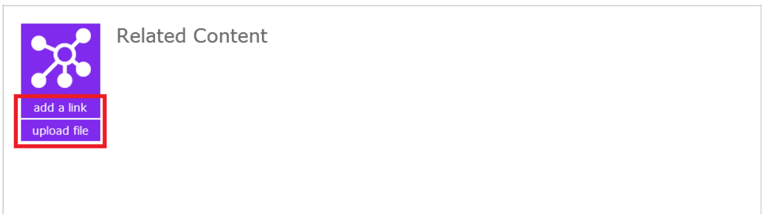
5. Select the lab you would like to relate the idea to and click **Add**. The selected ideas is added to the chosen lab.




*Screenshot 601: Choose a destination lab*

## Adding Related Content

Experts and Sponsors can add documents and links that relate to an Innovation Lab (for example, research).

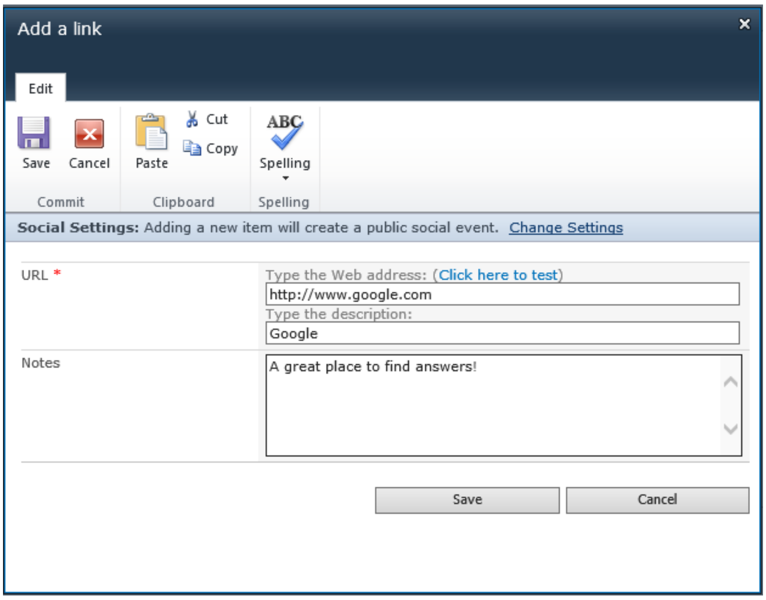



*Screenshot 602: You can add a link or upload file*

To add documents or links, do the following:

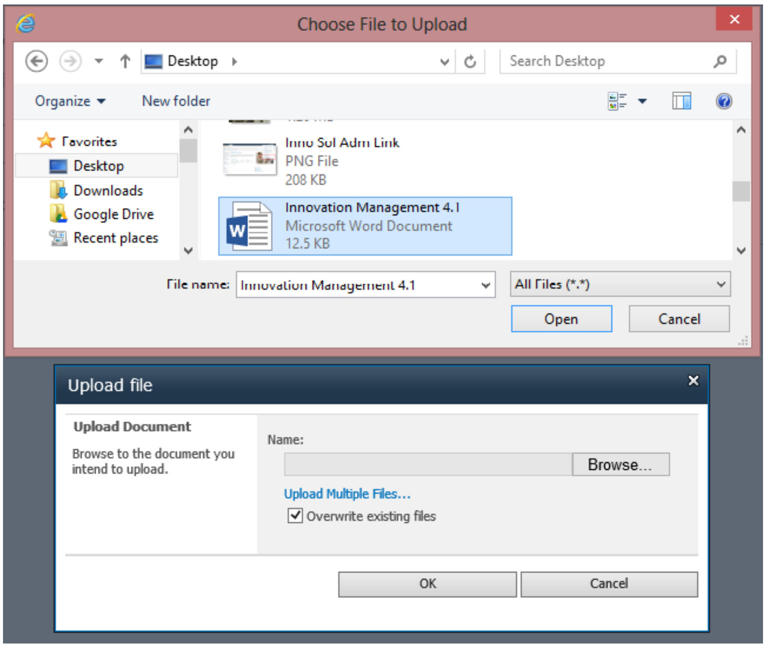
1. Click on **add a link** A dialog pops up where the URL, description, and notes field can be filled in.

2. Click **Save** to post the link.



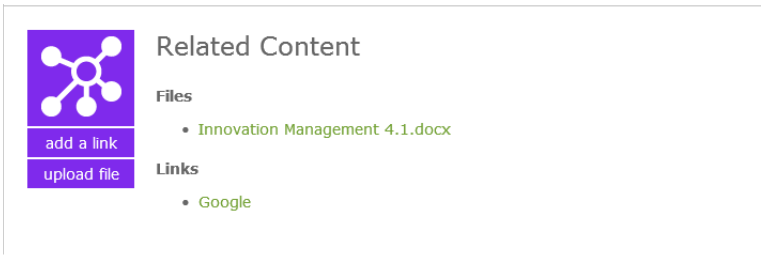

*Screenshot 603: Enter details*

3. Similarly, clicking on **Upload File** pops up a dialog prompting for file. Clicking on Browse opens up the file chooser.



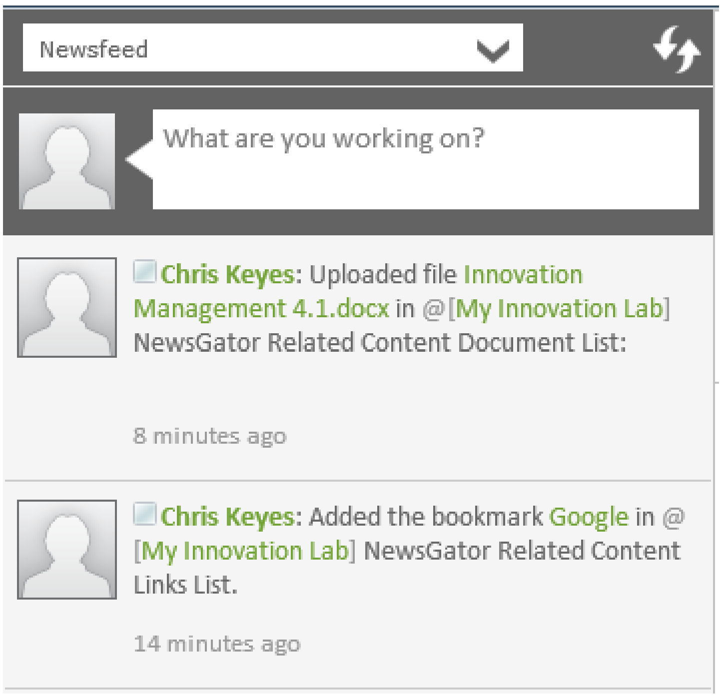

*Screenshot 604: Upload files*

Here is what the Related Content area looks like in an Innovation Lab:




*Screenshot 605: Related content area*

There are the entries in the stream to reflect these actions (as well others described below).



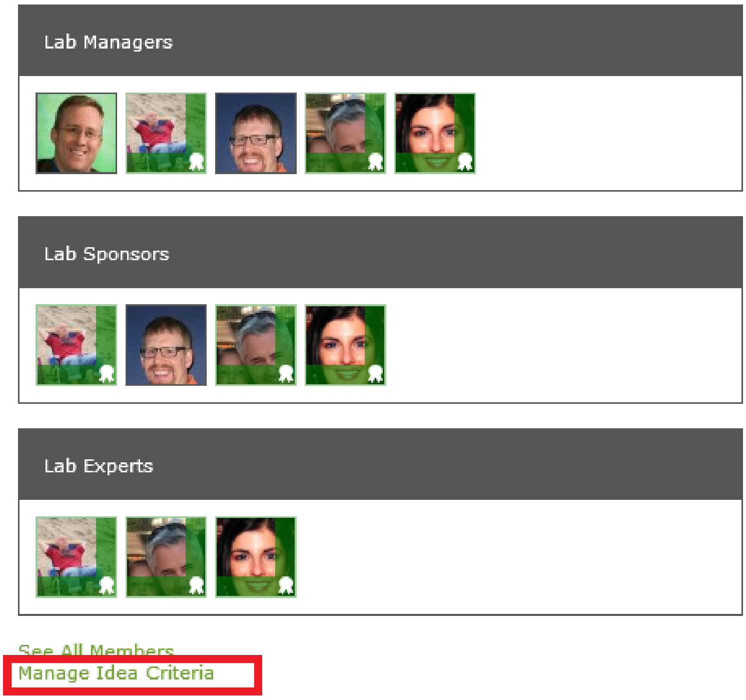

*Screenshot 606: Entries in the stream*

## 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.

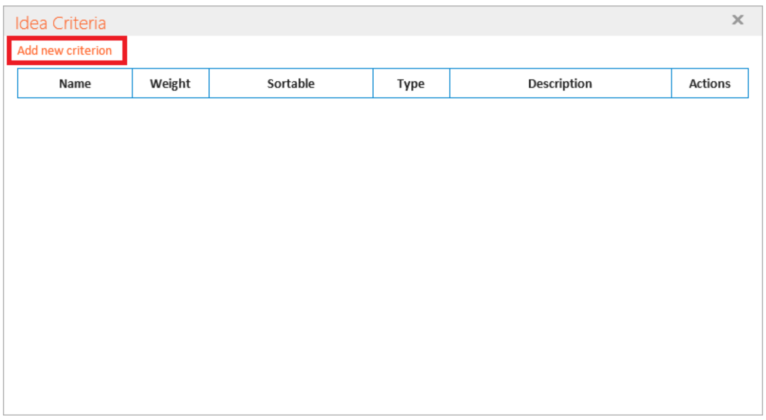
To specify these criteria, do the following:

1. Click on **Manage Idea Criteria** under **See All Members**.



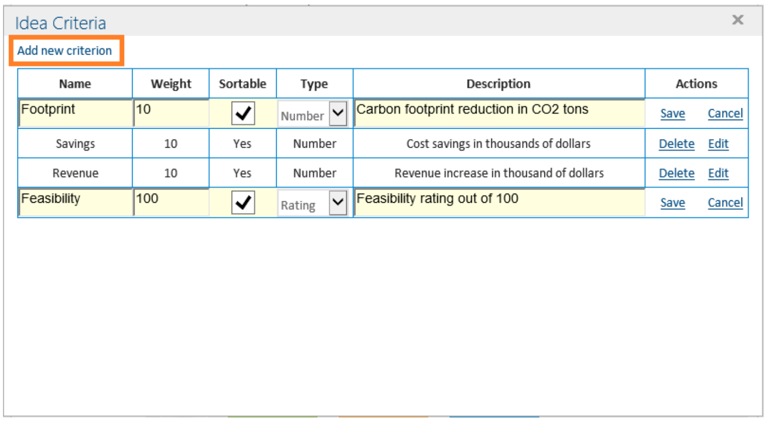

*Screenshot 607: Click Manage Idea Criteria*

2. A panel is opened, where the idea assessment criteria can be specified. Click on Add new criterion.




*Screenshot 608: Click Add new criterion*

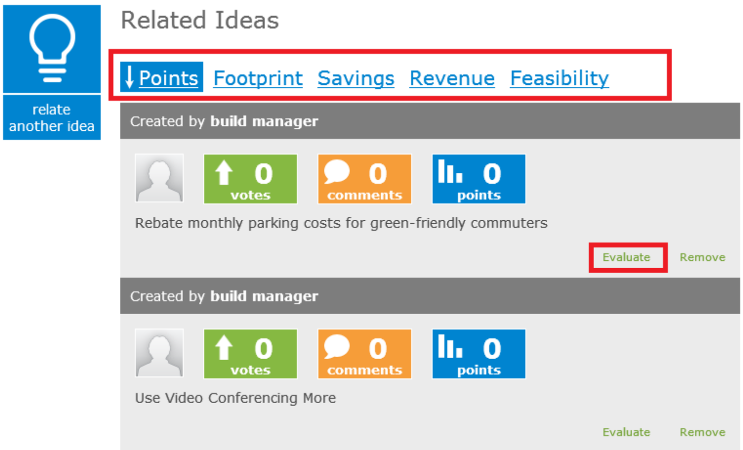
3. Enter details on the fields. Each criteria has a name, a type and a weight. Initially there are two criteria types: rating and number. The sum of the criteria (times the weight) comprises the score of the idea.




*Screenshot 609: Enter criteria details*

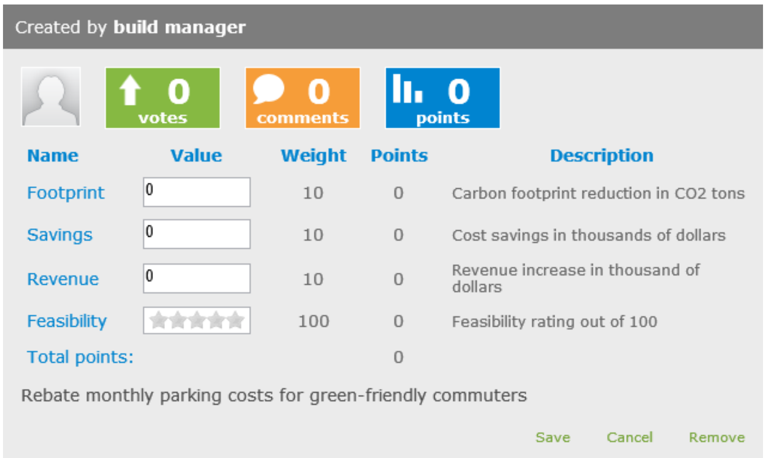
## Assessing the Ideas

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 appears on each related idea as well as an **Evaluate** link.




*Screenshot 610: Click **Evaluate***

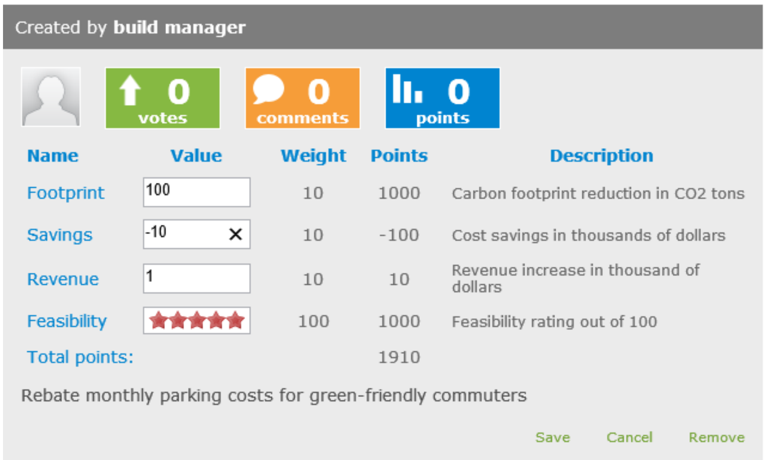
1. Click on **Evaluate**. In the displayed area, input the assessment data.




*Screenshot 611: Input the assessment data*

2. Click on the appropriate star for the rating-based criteria and enter a number of the value for the number-based criteria.

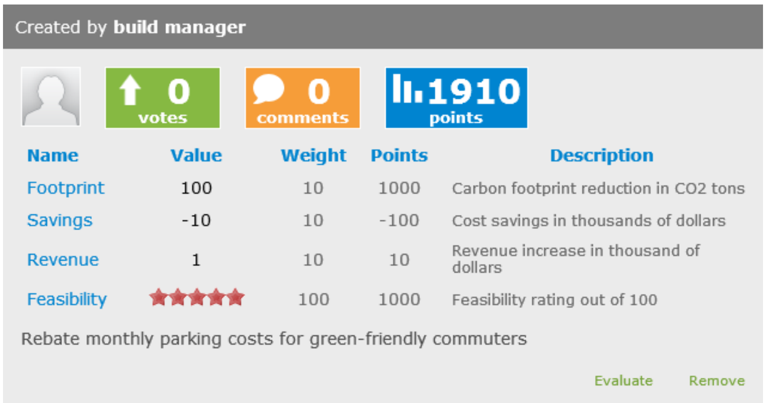
3. Click **Save**.




*Screenshot 612: Enter the rating and 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

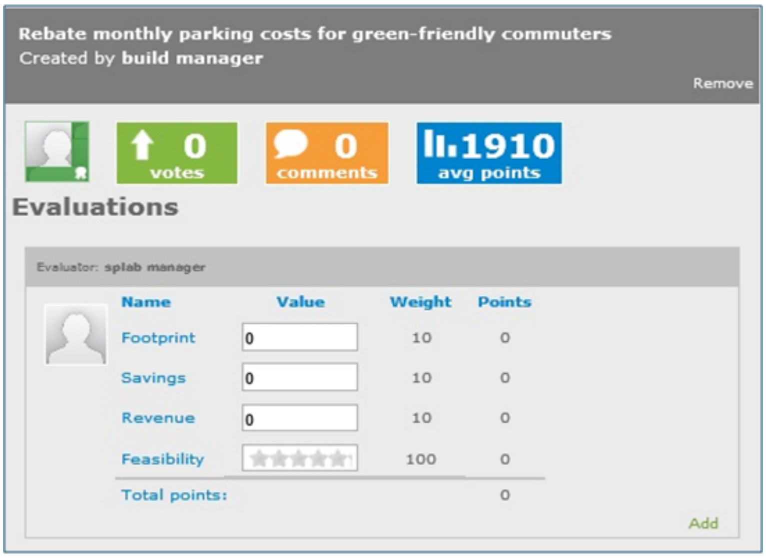



*Screenshot 613: Idea rated*

## Multiple expert assessments

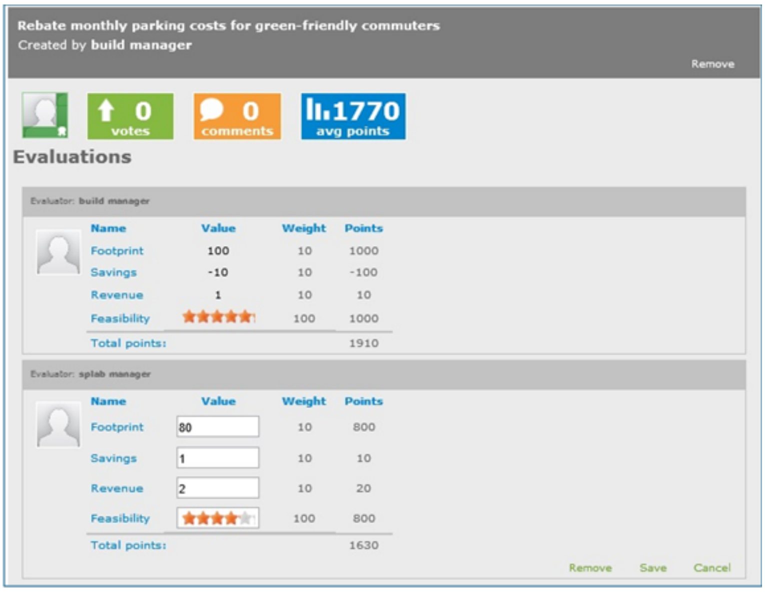
In the 4.5.2 version, we introduced the ability for one or more experts to evaluate each Idea in the Related Ideas list. If more than one expert evaluates an Idea, the total points for the individual criteria as well as the total overall points for the Idea is averaged by the total number of evaluations.

> **Note:**
> 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.




Screenshot 614: Initiating multiple assessment

Once an expert creates their own evaluation, the individual evaluations of the other experts are visible.

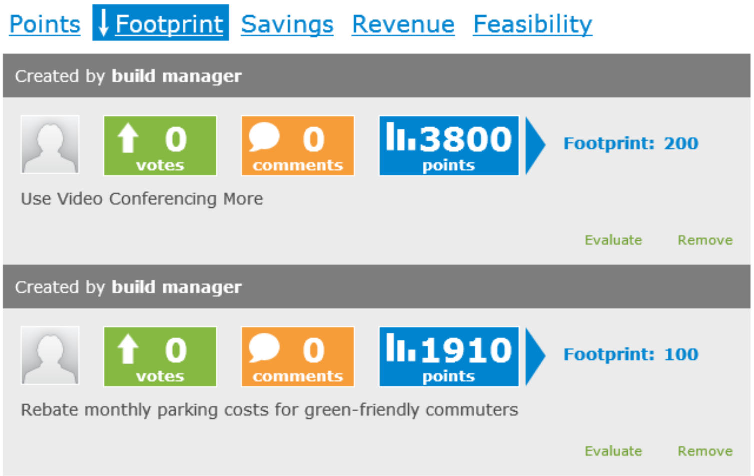



Screenshot 615: The evaluation of other experts are visible

## Reviewing the assessments

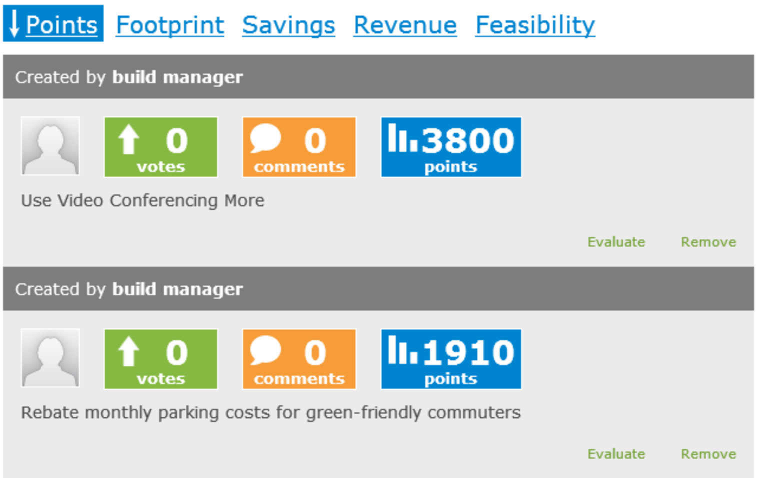
To review the evaluations by overall points and the various criteria, click on the appropriate filter.

By **Footprint**:




*Screenshot 616: Review by **Footprint***

By **Points**:




*Screenshot 617: Review 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.

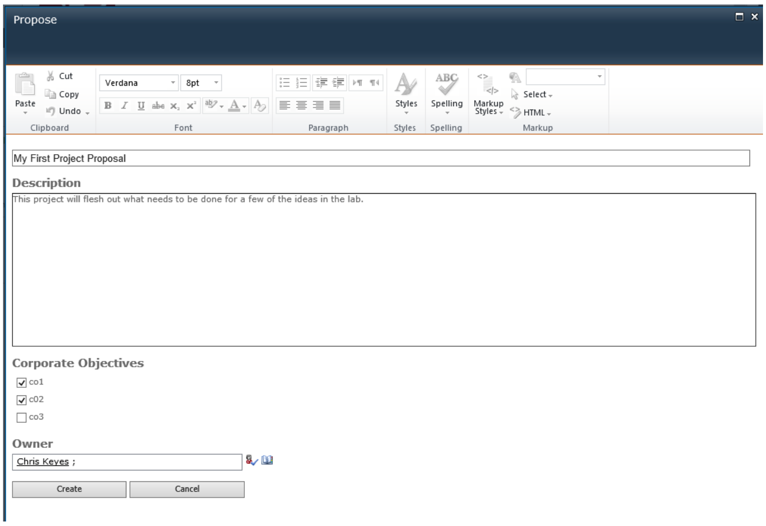
Proposed Projects are still being analyzed and evaluated, and have an initial status of “Under Review”.

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:

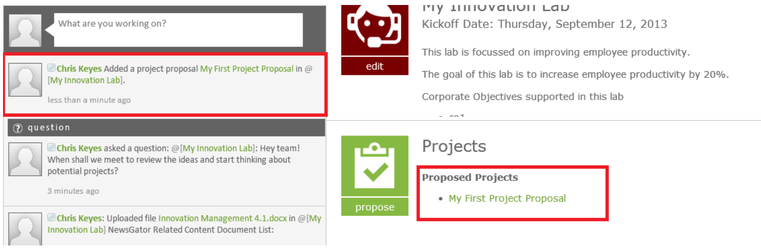
- Title
- Description
- Owner (defaults to creator)
- Corporate Objectives




Screenshot 618: Specify the fields

After the project proposal has been created, it is listed under Proposed Projects and there is an activity in the stream to reflect that action.

Clicking on the title in the stream brings up the project proposal details.




Screenshot 619: Created proposal is listed under Proposed Projects

Click on **Edit** to modify the title, description, and owner.

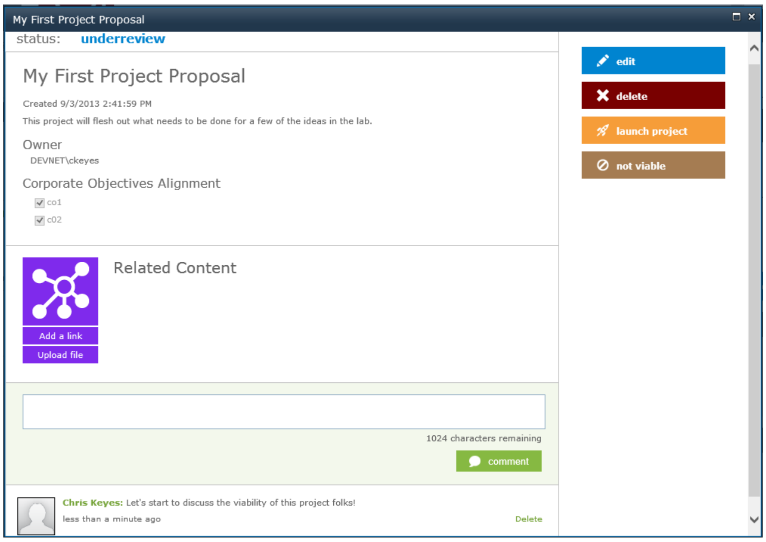
The project may deleted in the future by clicking on **Delete**.

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:**
> The initial status of the project proposal is "Under Review."




*Screenshot 620: Project proposal is created*

## 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** appears in the **Projects** area if the **View All** option is selected.

You can reactivate projects marked as Not Viable, in the future, by clicking on the project proposal link and clicking **Reactivate**.

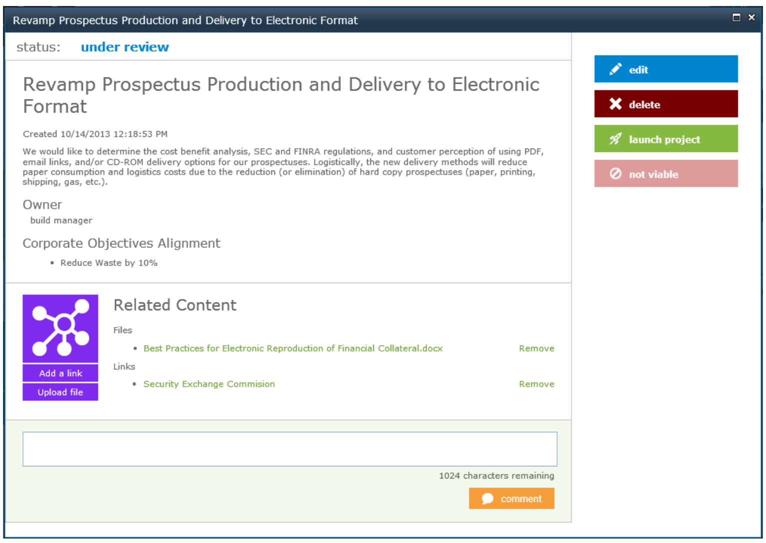
## Launching a project and creating project communities

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 (for example, documents, links etc.).

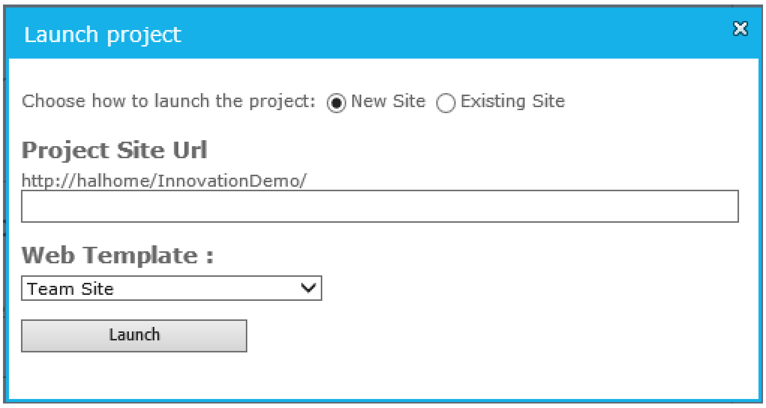
A project community also helps provide continuity with the overall innovation process as it is linked to the Labs, Project Proposals, and ideas that inspired it, as well as the Corporate Objectives it aligns with.

Let's look at a sample project containing related content that is ready to be launched:

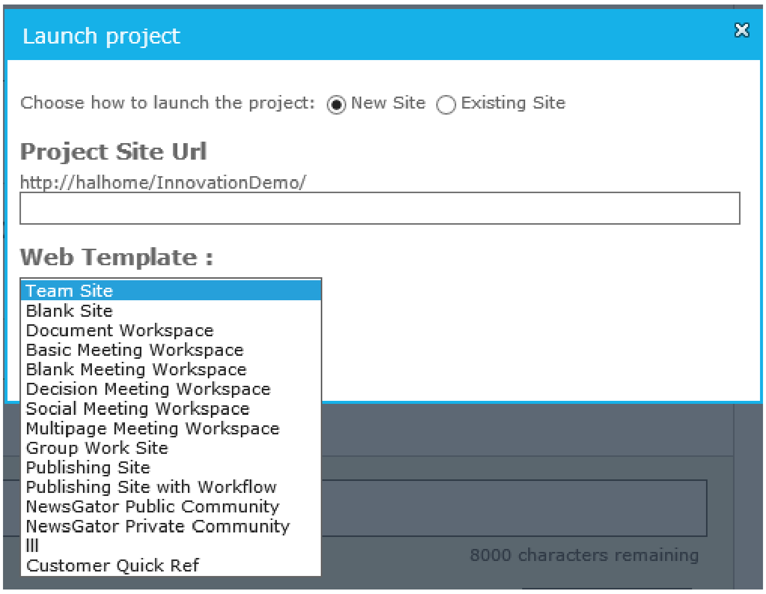



*Screenshot 621: Sample project*

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.

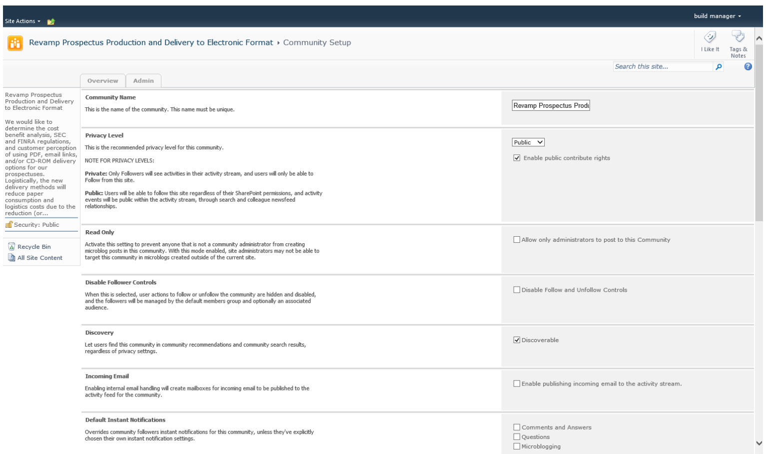



*Screenshot 622: Specify URL and select template*

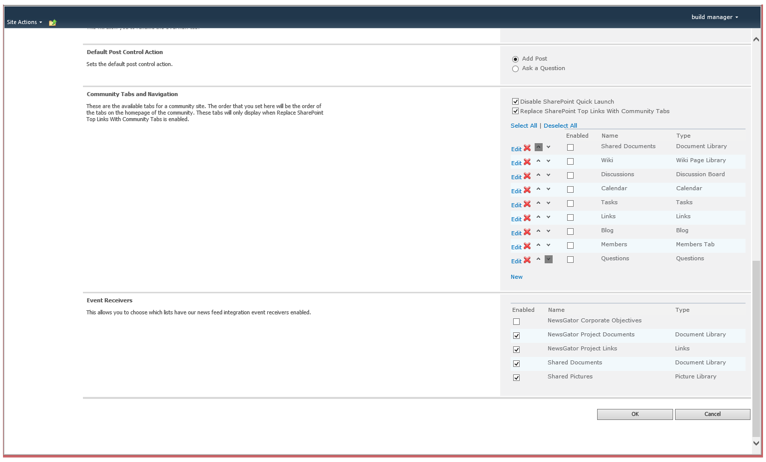



*Screenshot 623: Select template*

Clicking on create starts the process for creating the site. This example is for a public Aurea Social community:

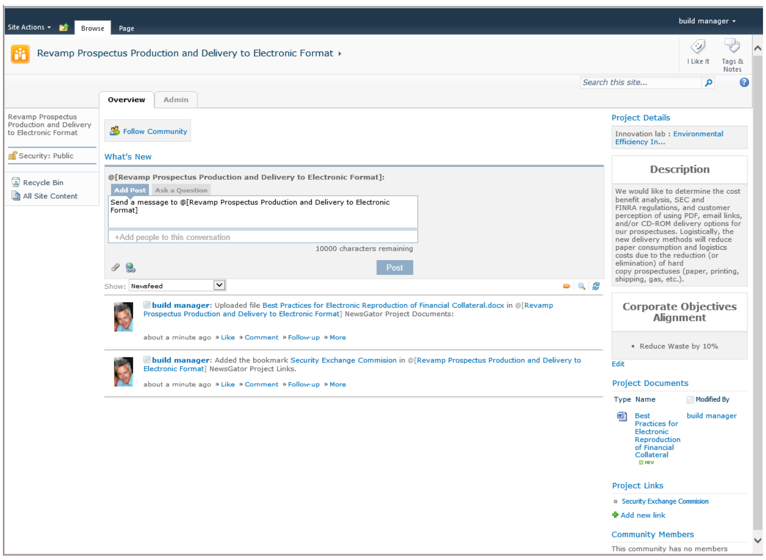



*Screenshot 624: Public Aurea Social community*



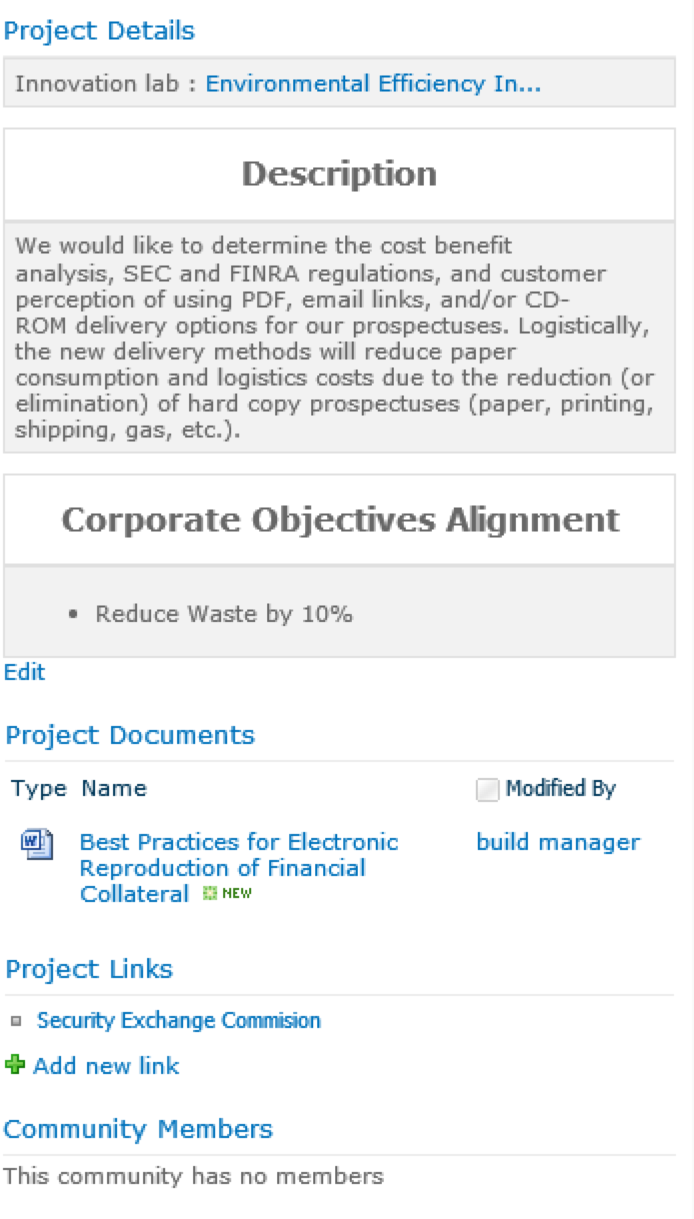

*Screenshot 625: Public Aurea Social community*

This is what the community itself looks like after clicking on **Ok** (other Aurea Social features can be enabled like Video Stream and Enrich to help manage the project).



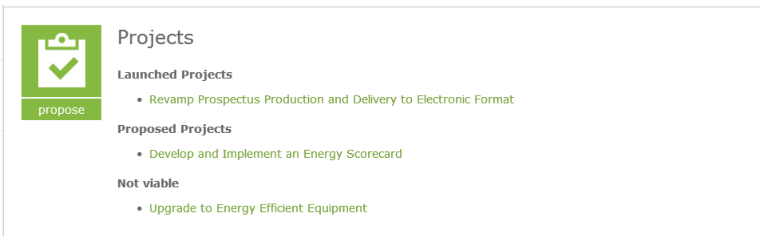

*Screenshot 626: This is how the community looks like*

> **Note:**
> 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.




*Screenshot 627: Project details*

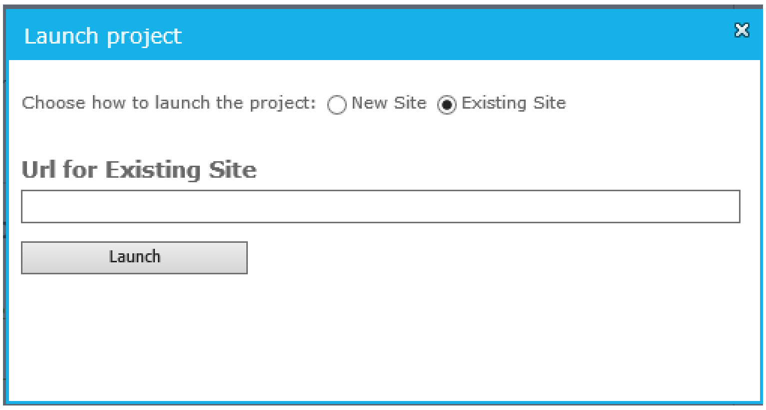
This project will then display as a Launched Project on the main Lab page with the other projects. Clicking on the launched project takes the user to the project site. The screen shot below also shows a project that has been marked as Not Viable.




*Screenshot 628: Projects*

Selecting **Existing Site** pops up a panel prompting you for a URL. This follows a similar process when creating a project community from scratch. That is:

- all documents, links and objectives will be exported to the project site and
- the project proposal will be linked to the specified site.



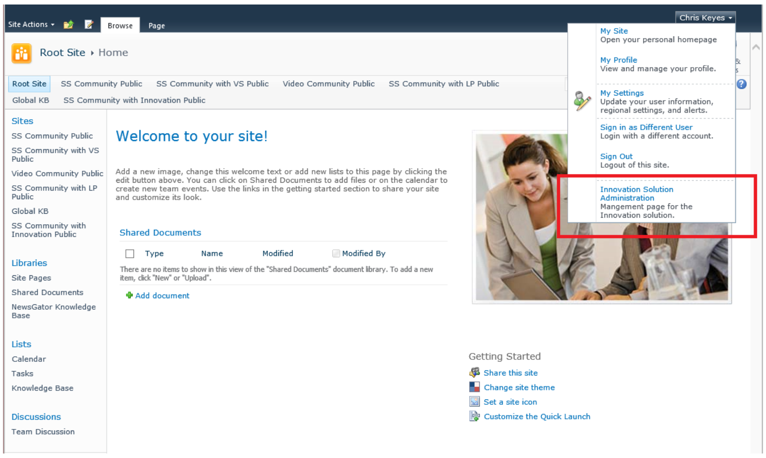

*Screenshot 629: Enter url and click Launch*

## Administering the process

## Adding corporate objectives

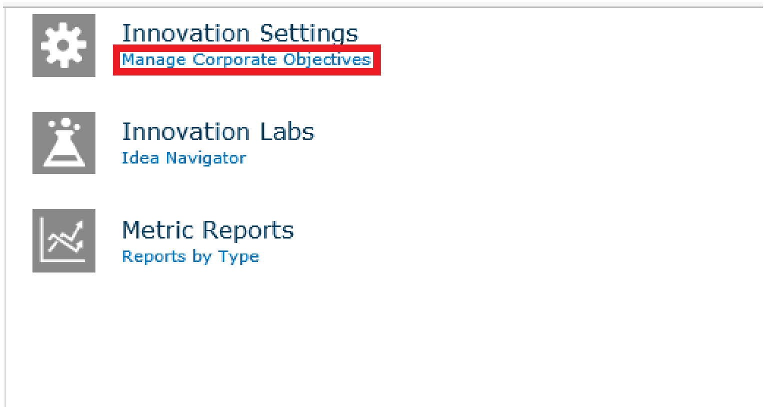
One of the main goals throughout the innovation process is to make sure innovation projects are allocated and tracked back to corporate objectives.

To setup a corporate objective, click on Innovation Solution Administration in the personal pull-down menu in the top tight corner in SharePoint.




*Screenshot 630: Click on Innovation Solution Administration*

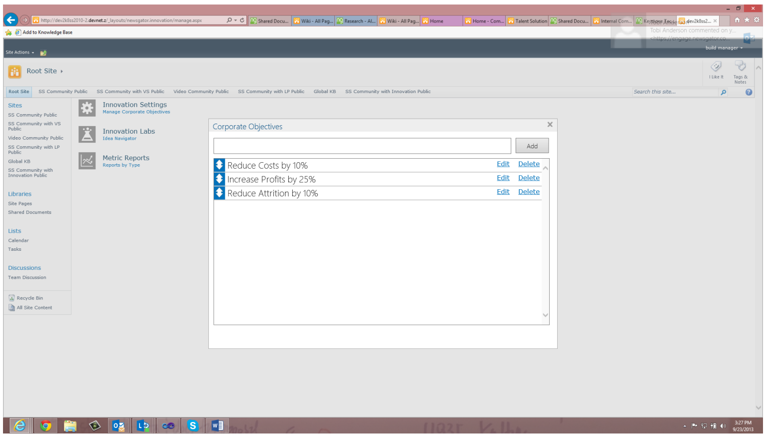
Click on the **Manage Corporate Objectives** link under **Innovation Settings.**




*Screenshot 631: Click on the Manage Corporate Objectives*

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.




*Screenshot 632: Add Corporate Objective*

## 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

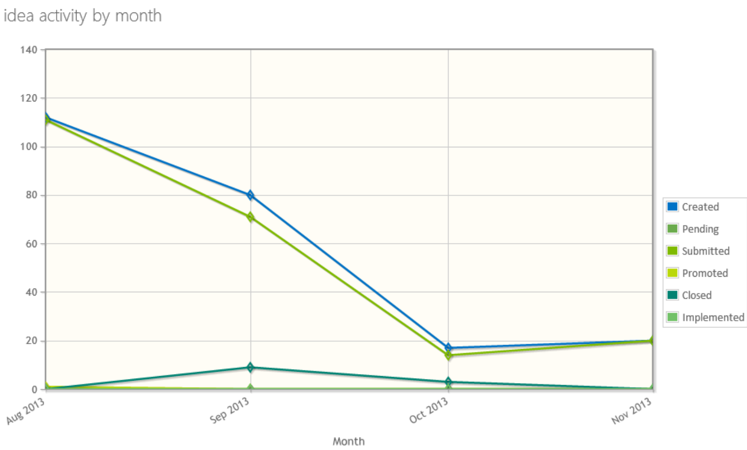
» Innovation Labs and Corporate Objectives Alignment by Month : New labs per month, total corporate objective alignment per month

» 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

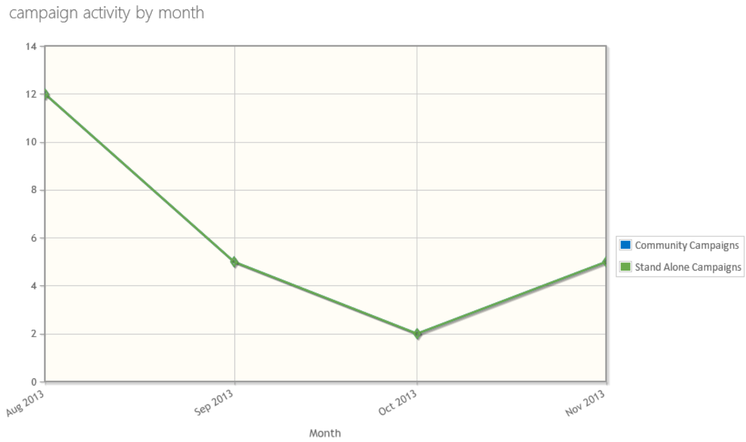
» Project Communities and Corporate Objective Alignment by Month: New project communities per month, total corporate objective alignment per month

Here is what the reports look like:



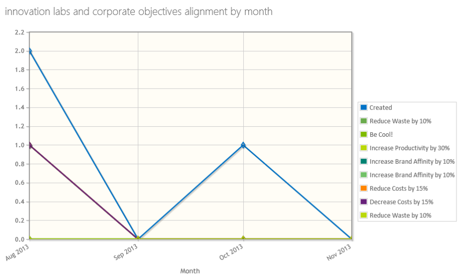

| year | month | created | current status of created ideas | | | | |
|---|---|---|---|---|---|---|---|
| | | | pending | submitted | promoted | closed | implemented |
| 2013 | August | 112 | 0 | 111 | 1 | 0 | 0 |
| 2013 | September | 80 | 0 | 71 | 0 | 9 | 0 |
| 2013 | October | 17 | 0 | 14 | 0 | 3 | 0 |

*Screenshot 633: Idea activity by Month*



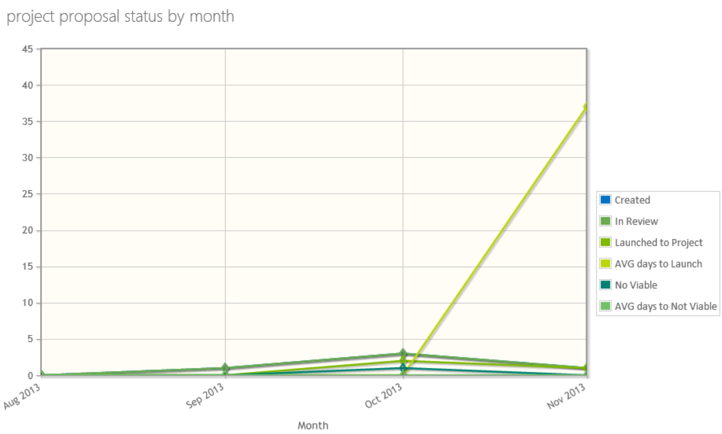

| year | month | stand alone campaigns | community campaigns |
|---|---|---|---|
| 2013 | August | 12 | 12 |
| 2013 | September | 5 | 5 |
| 2013 | October | 2 | 2 |
| 2013 | November | 5 | 5 |

*Screenshot 634: Campaign activity by Month*



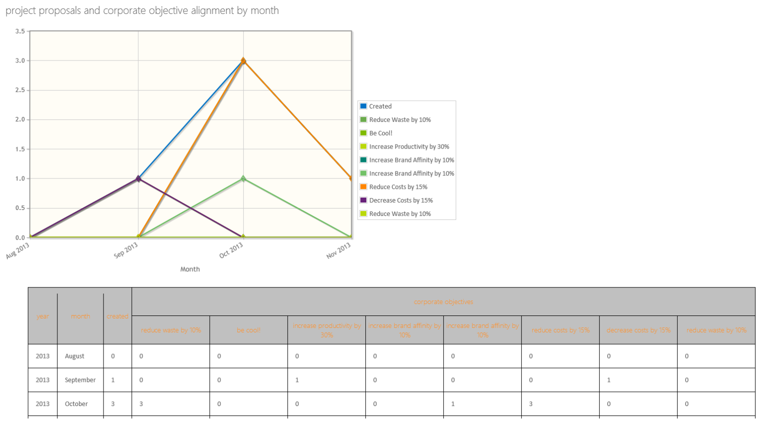

| year | month | created | corporate objectives | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | reduce waste by 10% | be cool! | increase productivity by 30% | increase brand affinity by 10% | increase brand affinity by 10% | reduce costs by 15% | decrease costs by 15% | reduce 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 |

*Screenshot 635: Innovation Labs and Corporate Objectives Alignment by Month*



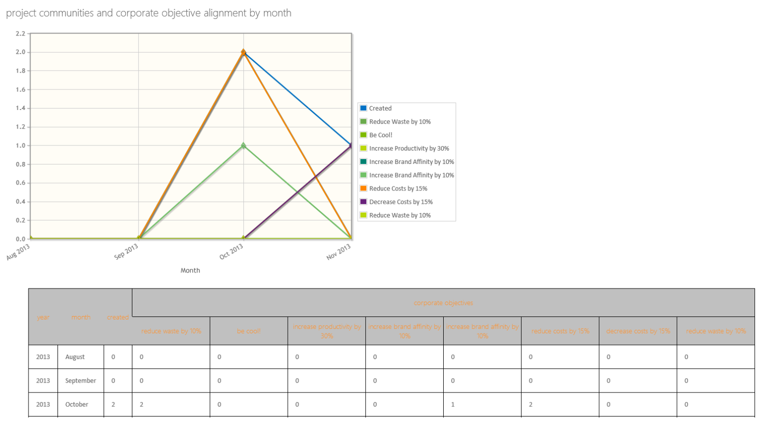

| year | month | created | in review | launched to project | avg days to launch | no viable | avg days to not viable |
|---|---|---|---|---|---|---|---|
| 2013 | August | 0 | 0 | 0 | 0 | 0 | 0 |
| 2013 | September | 1 | 1 | 0 | 0 | 0 | 0 |
| 2013 | October | 6 | 3 | 2 | 0 | 1 | 0 |
| 2013 | November | 2 | 1 | 1 | 37 | 0 | 0 |

*Screenshot 636: Project Proposals 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 |

*Screenshot 637: 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 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2013 | October | 2 | 2 | 0 | 0 | 0 | 1 | 2 | 0 | 0 |

*Screenshot 638: Project Communities and Corporate Objective Alignment by Month*

## 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 Man-ager [3] | Lab Spon-sor [3] | Lab Expert [3] | Lab Mem-ber [4] | Lab Visitor |
|---|---|---|---|---|---|---|---|---|
| Admin | | | | | | | | |
| | Add Corporate Objectives | Y | | | | | | |
| | View Metrics | Y | | | | | | |
| | Change Innovation Settings | Y | | | | | | |
| Lab | | | | | | | | |
| | Create Labs[6] | | | | | | | |
| | Delete Lab[6] | | | | | | | |
| | Edit lab properties | | Y | Y | Y | | | |
| | Assign members to roles | | Y | Y | | | | |
| | Relate Ideas | Y | Y | Y | Y | Y | | |

| Roles | Function | Innov-ation Admin [1] | Site Owner [2] | Lab Man-ager [3] | Lab Spon-sor [3] | Lab Expert [3] | Lab Mem-ber [4] | Lab Visitor |
|---|---|---|---|---|---|---|---|---|
| | Unrelate Ideas | | Y | Y | Y | | | |
| | Project Proposals | | | | | | | |
| | Create[6] | | Y | Y | Y | Y | | |
| | Edit[6] | | Y | Y | Y | Y | | |
| | Delete[6] | | Y | Y | Y | | | |
| | Mark Non Viable[6] | | Y | Y | Y | | | |
| | Reactivate[6] | | Y | Y | Y | | | |
| | Launch Project[5] | | Y | Y | Y | | | |
| | Add/Delete Related Content[6] | | 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[6] | Y | Y | Y | Y | Y | Y | Y |
| | Delete (lab) related content[6] | | 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, that is follow lab

[5] currently requires Manage Web Site, Manage List, Create Sub-sites

[6] with corresponding SharePoint list permissions

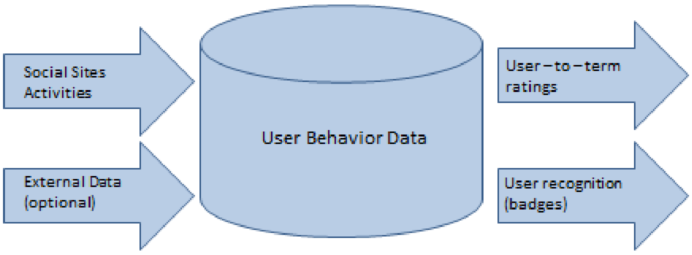
## Aurea Social Spotlight module

### Overview

The Spotlight module for Aurea 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 Aurea Social product.

The basic concept is illustrated below. Data is collected by Aurea 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 leader board (the Recognition functionality).



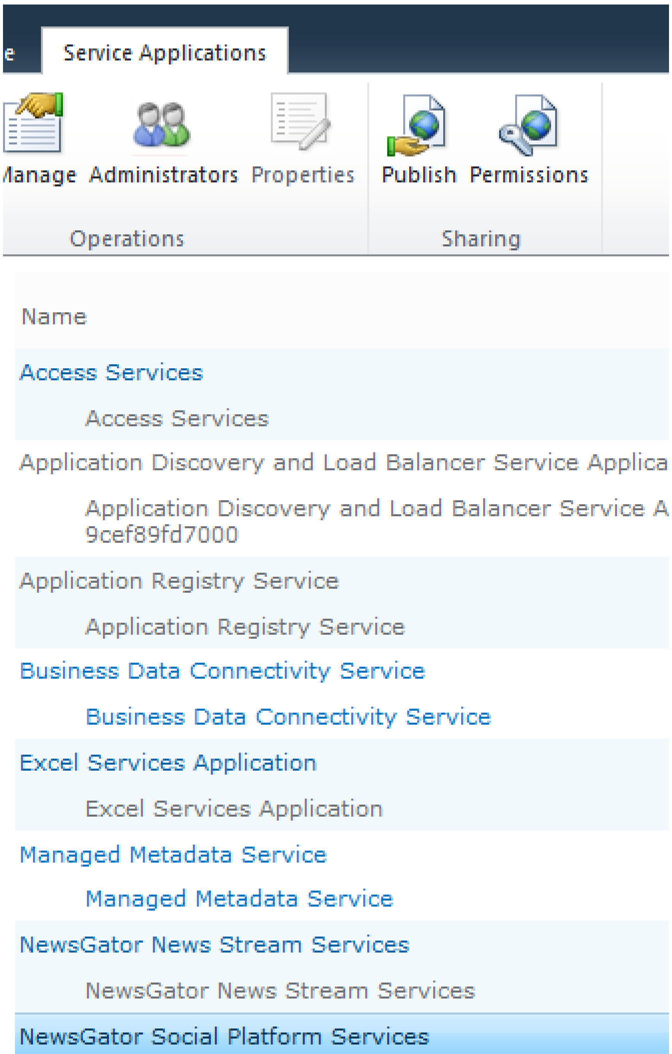

*Screenshot 639: Aurea Social Spotlight Module illustration*

For more information, see Aurea Social user guide.

## Granting administrative access

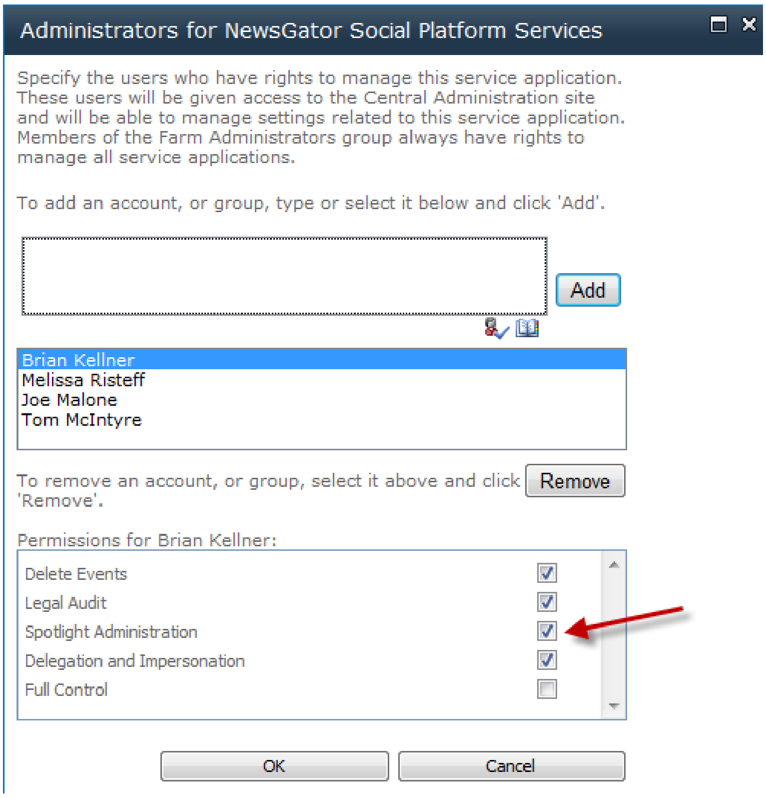
Access to administering community badges is available to individual community administrators, via the Admin tab in the community.

Access to systemwide Spotlight administration is granted in SharePoint Central Administration. Highlight NewsGator Social Platform Services and click Administrators in the ribbon.




*Screenshot 640: Click Administrators*

Your administrators have to check the Spotlight Administration box.




*Screenshot 641: Spotlight Administration is checked*

## Rights required to change expertise scoring

You may 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 cannot work.

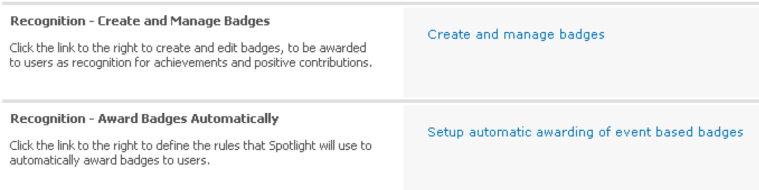
For further details on the Recalculate functionality, see **Recalculate every time you change the weights** in Setting up and administering the Expertise feature.

## 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:


*Screenshot 642: Click Spotlight Administration*

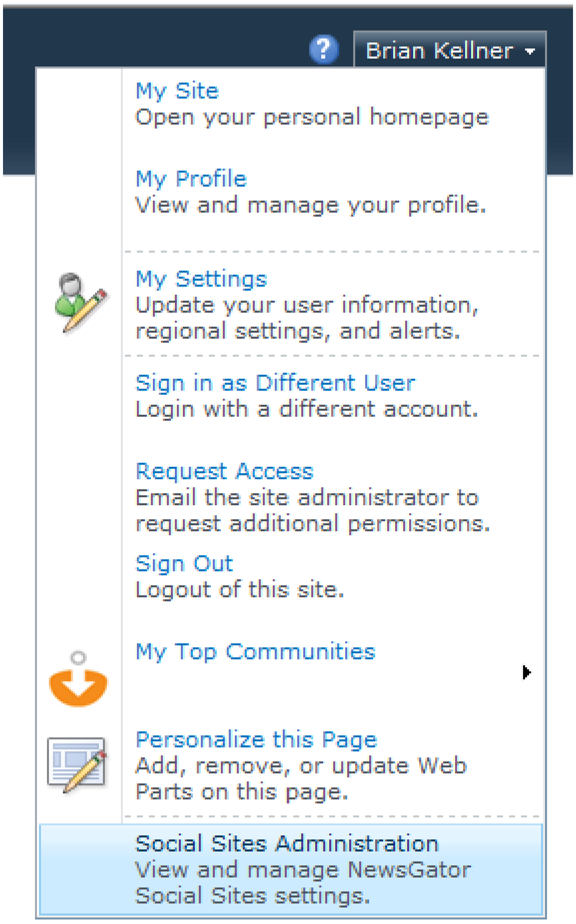
This opens an administration page which is a limited version of the global **Spotlight Administration** page:




*Screenshot 643: Administration page*

As for navigation to the global Spotlight management page, those upgrading from the 2.0 version of Aurea 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 Aurea 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.




*Screenshot 644: Click Social Sites Administration*


*Screenshot 645: Click Spotlight Administration*

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 see a **Spotlight Administration** link on this page that takes 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**".

To activate Site collection features, do the following:

1. Go to **Site Actions > Site Settings**.

2. Click on **Go to top-level Site Settings** if displayed. Then click **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 communicating 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
- 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
- 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.

#### Function and configurability of the expertise engine

Below are the 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

» 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: 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
- Tag SharePoint content

» Passive: 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 is 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 gets 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 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, do the following:

1. Go to the **Expertise - Inputs and Weights** section in the **Spotlight Management** page,

2. Click **Manage Expertise inputs and weights**. You should see a screen like the one pictured here.

**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 | |
| Recieve tag on your SharePoint content | Internal Activity | 5 | |
| Your SharePoint content was rated | Internal Activity | 3 | |

*Screenshot 646: Manage Expertise inputs and weights screen*

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, do the following:

1. Click the **Edit** icon in the **Actions** column.

2. 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 still counts the events that occur for that input, so that if you later decide the input should be included after all, it is 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 goes 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 is 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:

» You must be a farm administrator.

» 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 fails.

## 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 is 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, do the following:

1. Go to the Expertise - Inputs and Weights section in the Spotlight Management page,

2. Click **Manage Expertise inputs and weights**.

3. In the **Add Expertise Scoring Input** section, click **Add Expertise Scoring Input**.

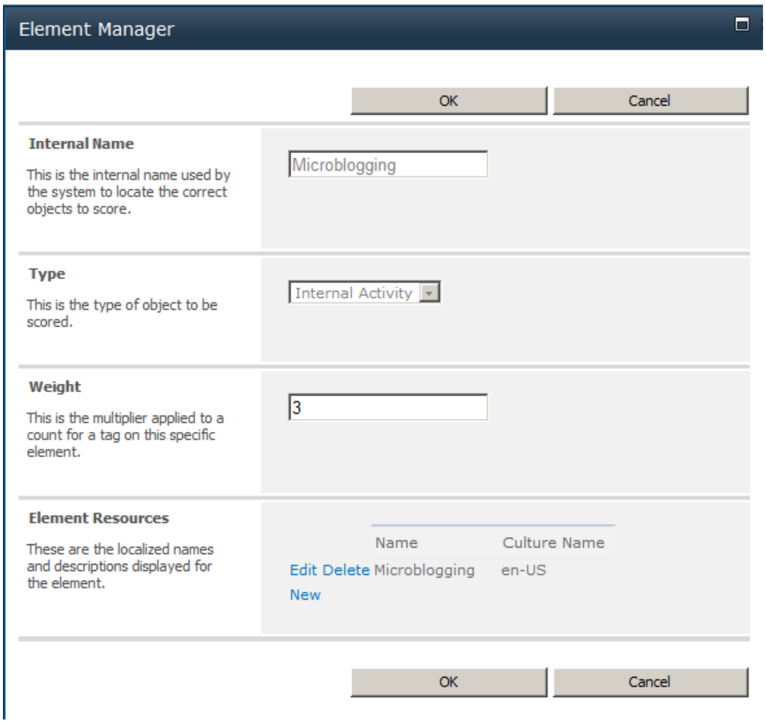
4. Set **Type** to **Profile Property**. Provide the internal name of the property. To discover the internal name of the property, do the following:

a. In the Central Administration go to **Manage Service Applications > User Profile Service application > Manage User Properties**.

b. Find the name of the property you want to in the list and click on it.

c. Choose **Edit** from the context menu that appears. At the top are **Name** and **Display Name**. (**Name** is the internal name).

5. Provide a default weight, and optionally translate into other languages.




*Screenshot 647: Element manager*

## 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 Aurea 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 Aurea 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, do the following:

1. Go to the **Expertise - Inputs and Weights** section in the **Spotlight Management** page.

2. Click **Manage Expertise inputs and weights**.

3. 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.

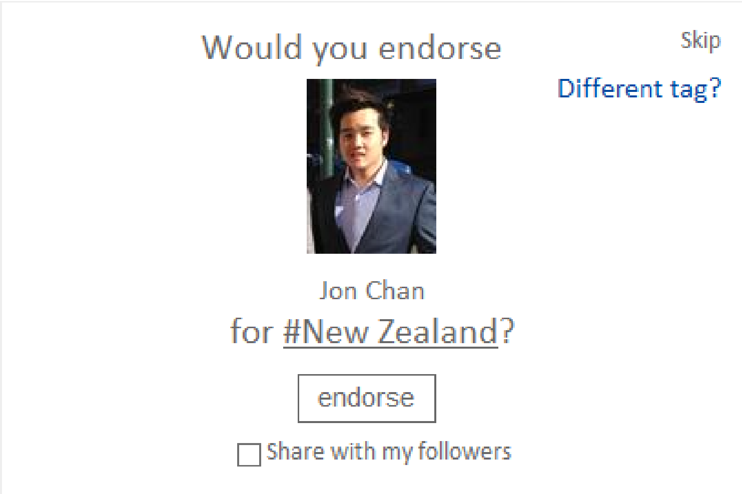
Below is a sample .Net application that uses this API, and can be run from the console to allow testing of the external input functionality with Expertise.

```
classProgram
    {
        staticvoid Main(string[] args)
        {
            if (args.Length < 6)
            {
                Console.WriteLine("Usage: SpotlightTest <accoun-
tName><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}", actu-
alString);
                return;
            }

            try
            {
                SocialSpotlightClient client = newSocialSpotlightClient();
                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.

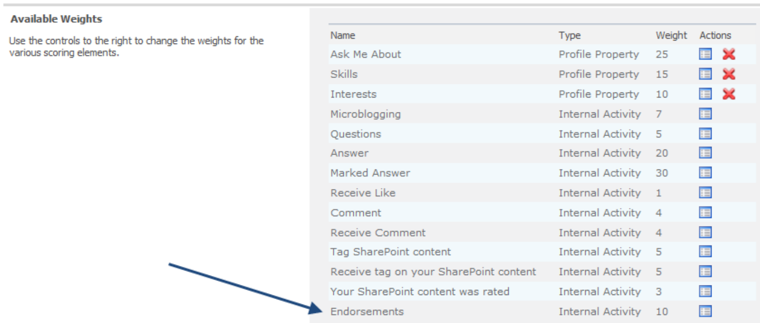
The primary point of user experience is the new endorsements web part.




*Screenshot 648: 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 | |

*Screenshot 649: Expertise Inputs and Weights*

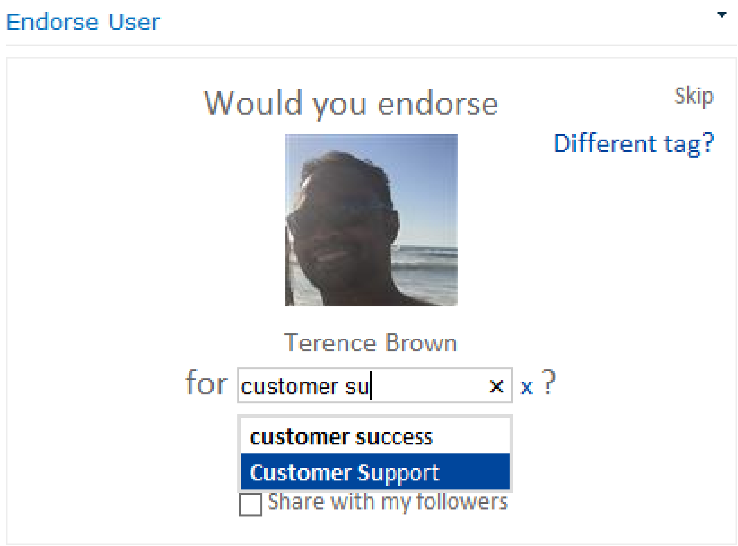
If the endorsing user clicks the, **Share with my followers** checkbox, a microblog is created in the activity stream which is visible to everyone who follows the endorser.


*Screenshot 650: Microblog*

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:**
> 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.




*Screenshot 651: Type the skill a user is endorsed for*

**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.

To view administrative report, do the following:

1. Go to the **Reports section** in the **Spotlight Management** page.

2. Click **Admin reports on Expertise**. This brings you to a page with a dropdown that says **Select A Report**, and containing four report selections.

3. 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.

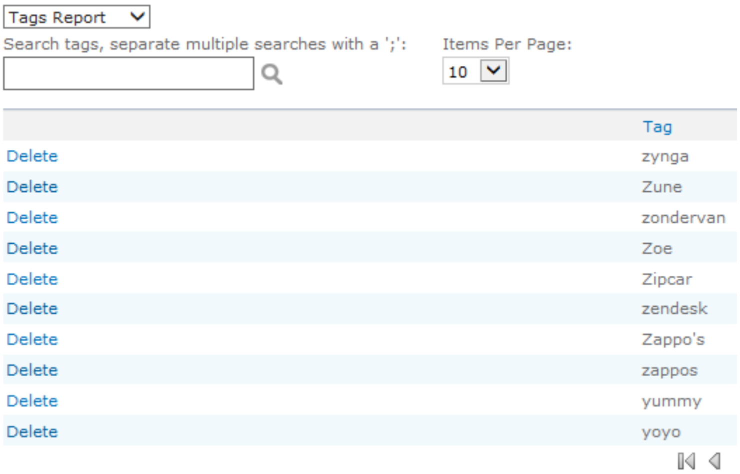
## Tags report and Deleted Tags report

The **Tags Report** and the **Deleted Tags Report** show all tags, ordered by highest individual expertise score.

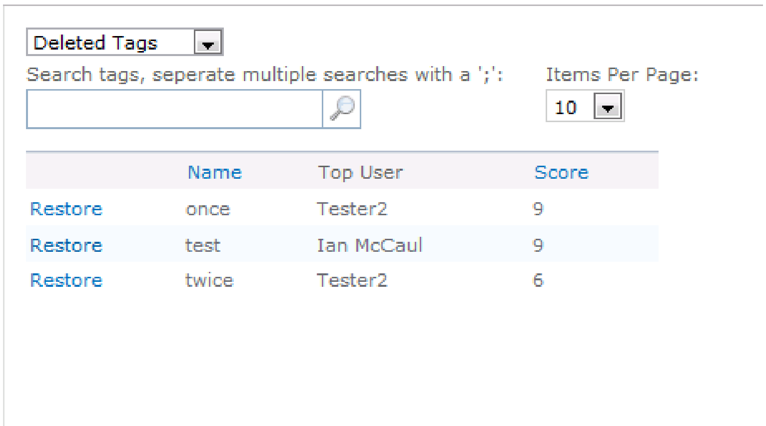
The **Tags Report** shows only tags that have not been deleted, and the **Deleted Tags Report** shows only tags that have been deleted.

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 remain deleted, no points accumulate for them, and they do not show in any end-user web part.




*Screenshot 652: Tags Report*




*Screenshot 653: Deleted Tags*

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

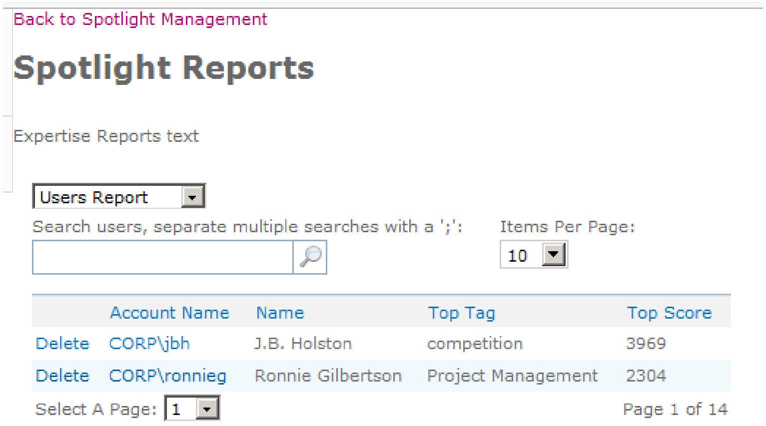
The other admin reports, the **Users Report** and the **Deleted Users Report**, show all users who have expertise scores.

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.




*Screenshot 654: Users report*

**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.


*Screenshot 655: User report*

**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 finds that it works the same as before.

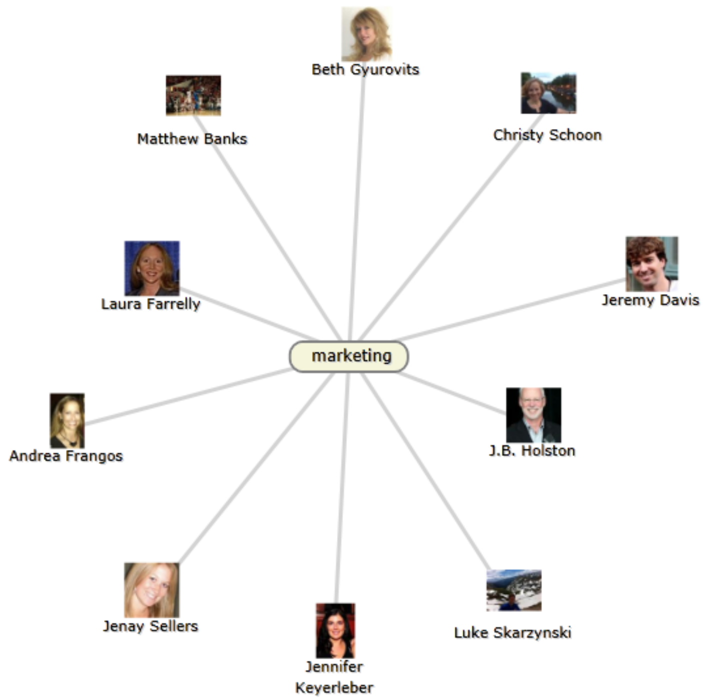
The Expertise Browser web part allows users to navigate through the expertise data in an unstructured pattern. It requires extra steps to deploy properly.

For deployment instructions, see Installing the Expertise Browser Web Part under Setting Up Spotlight.

The view begins with the top 50 highest scoring tags in the system arranged alphabetically and sized by overall score.


*Screenshot 656: Click on any of these tags*

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).




*Screenshot 657: User images linked to the tag is displayed*


*Screenshot 658: Tags linked with a user is displayed*

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 re-centers 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 is natural to want to ask that person a question. You can easily do so from either view.

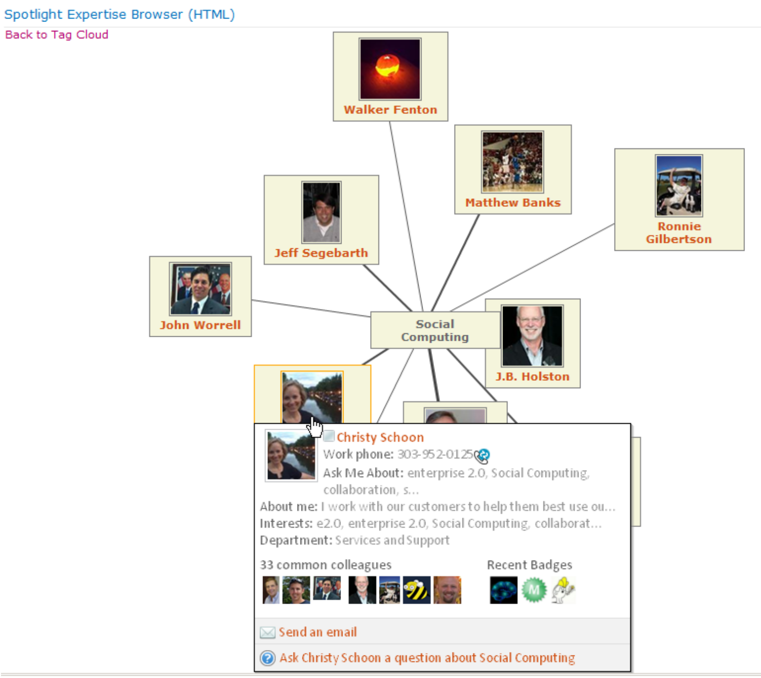
Just move your mouse pointer over the topic you want to ask about (when in the person-centered view), or over the person you want to ask (when in the tag-centered view).

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.

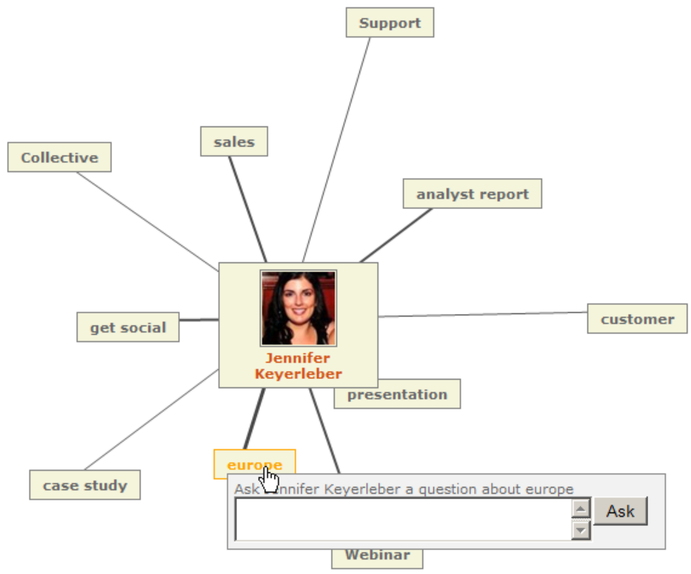
You don't need to include the person's @ target, nor the topic's hashtag: these are both added automatically after you click Post.

In the latter case, (pictured below left) you'll see "mini profile" card popup. Near the bottom of the card is 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 varies depending on the person and topic selected.




*Screenshot 659: Mini-profile card pop-up*




*Screenshot 660: Mini profile card provides option to ask questions to viewers*

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):** 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 has 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 (for example, 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 takes you to their profile page.

» **User-based search:** 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.

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 is displayed with his or her top tag, and clicking on the user shows 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.

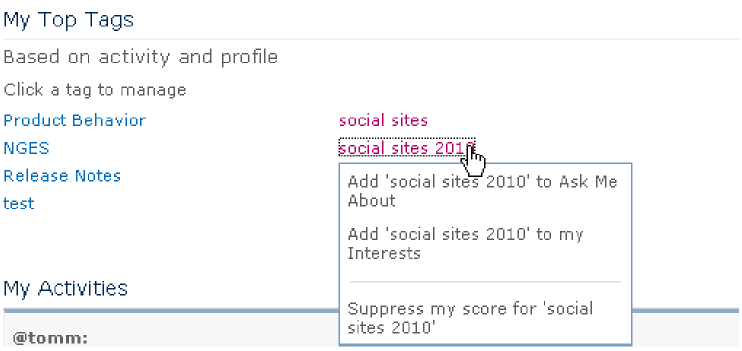
Very often this web part is displayed directly adjacent to the SharePoint **Ask Me About** web part on the user's profile page, and when Spotlight is first installed in the lists of tags displayed in these two web parts usually looks very similar.

However, over time, the tags in the **Areas of Expertise** web part more reflects 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 is 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 therefore sees the message **Click a tag to manage** in this web part. Clicking one of his areas of expertise shows a popup menu with up to three options, as appropriate:



*Screenshot 661: My Top Tags*

» **Add to my Ask Me About**: This adds the tag to the Ask Me About list in the user's SharePoint profile. This lets others find the user more easily in People Search.

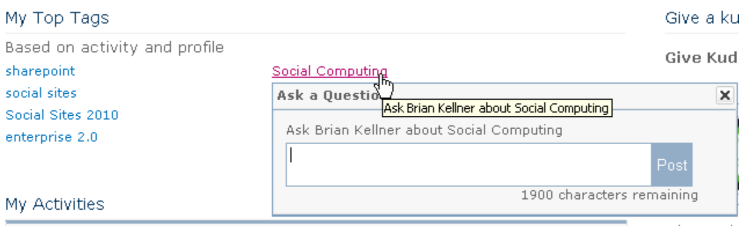
» **Add to my My Interests**: This adds the tag to the My Interests list in the user's SharePoint profile. This lets others find the user more easily in People Search.

» **Suppress my score for this tag**: This removes 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 also sees 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 do not see these options. Instead, when a visitor clicks on one of these tags, they 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

For further details, see Setting up Spotlight 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 becomes 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 Aurea Social, and ask for `BadgeIcons.zip`.

These icons are described below in Spotlight Module - Suggested uses for the included badge icons (and in a similar document included in `BadgeIcons.zip`).

To create a badge, do the following:

> **Note:**
> Have a graphic ready, either that you made or selected from `BadgeIcons.zip`.

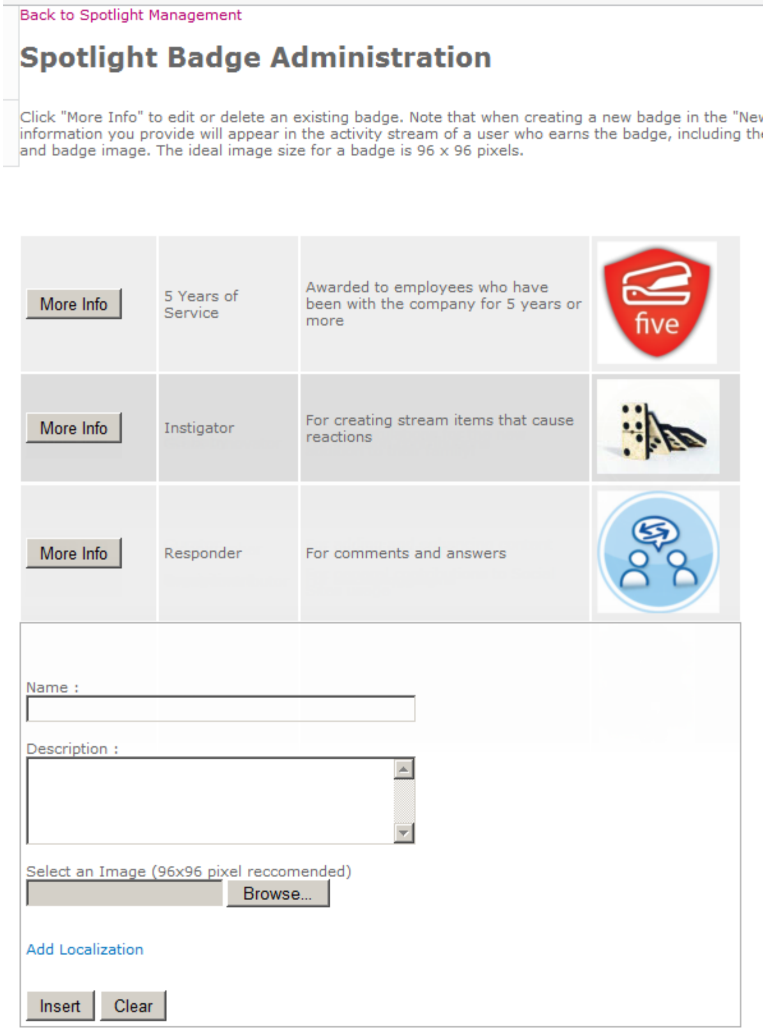
1. Go to the **Spotlight Management** page and navigate to **Recognition – Create and Manage Badges > Create and Manage Badges**. A page that lists already created badges is displayed (when you initially install, it shows no badges)

2. Scroll to the bottom of the page, and enter the badge name and description.

3. 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.)

4. Click **Insert** to create the new badge. You should see it in the listing immediately.

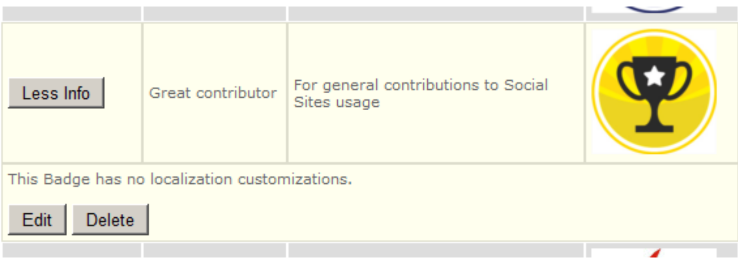
> **Description suggestions:** A good description begins with "For" or "Awarded for" followed by whatever the reason is for awarding the badge.




*Screenshot 662: Spotlight Badge Administration*

## 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.



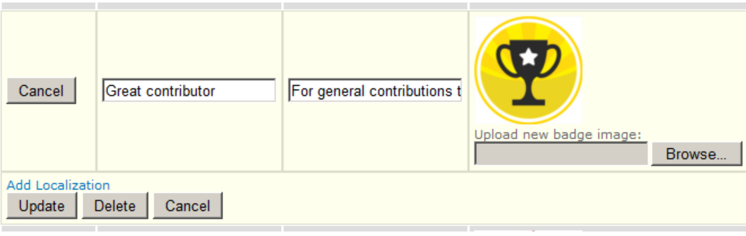

*Screenshot 663: Click **Edit** or **Delete***

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.

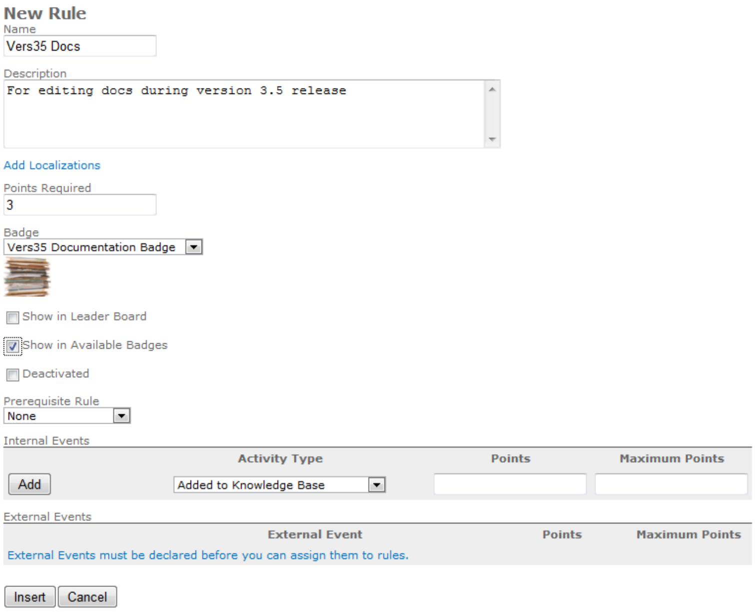
To edit the badge,

1. Click **Edit**. **Update** and **Cancel** buttons are displayed and all fields become editable.

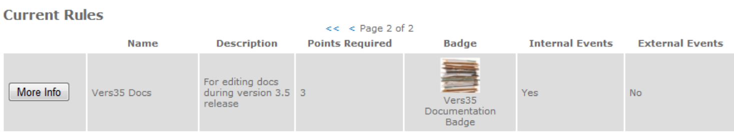
2. Make your changes and click **Update**.




*Screenshot 664: Click **Edit** or **Delete***




*Screenshot 665: Enter details*




*Screenshot 666: Current rules can be viewed here*

To create the rule, you must enter details on the **New Rule** 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.

For further details, see the Recognition feature Web Parts section below for full descriptions of these web parts.

The rule is not 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).

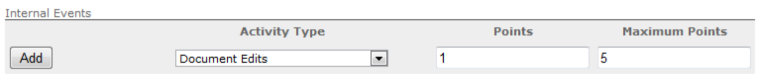
However, without any such inputs defined, the rule will do nothing and will not lead to any badges being awarded (and you ought to leave it deactivated until you do add some inputs for it). You also can add localizations of the rule name and description now, or wait until later.

See the three sections below for details on doing each of these:

- Adding internal events as rule inputs
- Adding external events as rule inputs
- Localizing a rule

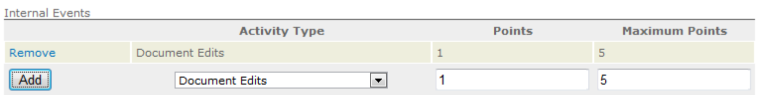
To specify event types to be scored for the rule, do the following:

1. 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.




*Screenshot 667: Select an activity type*

2. Click **Add**. This makes the added activity part of the scoring rules and allows specifying additional activities.



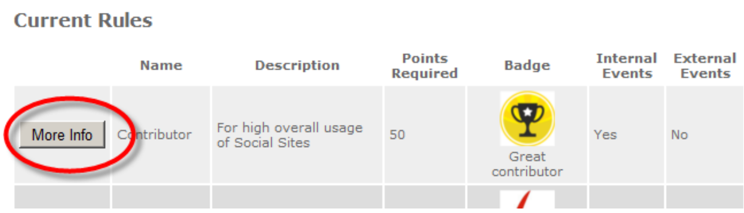

*Screenshot 668: Click Add*

3. 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

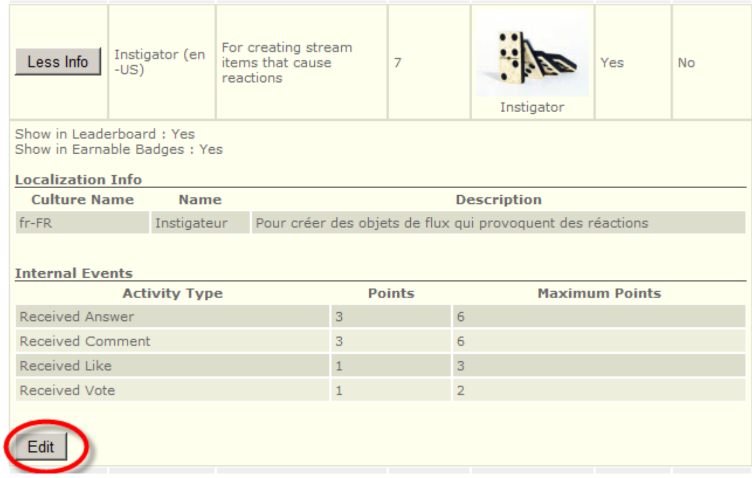
To make changes to an existing rule,

Click the **More Info** link next to the listing of the rule in the Spotlight Rule Definitions page.



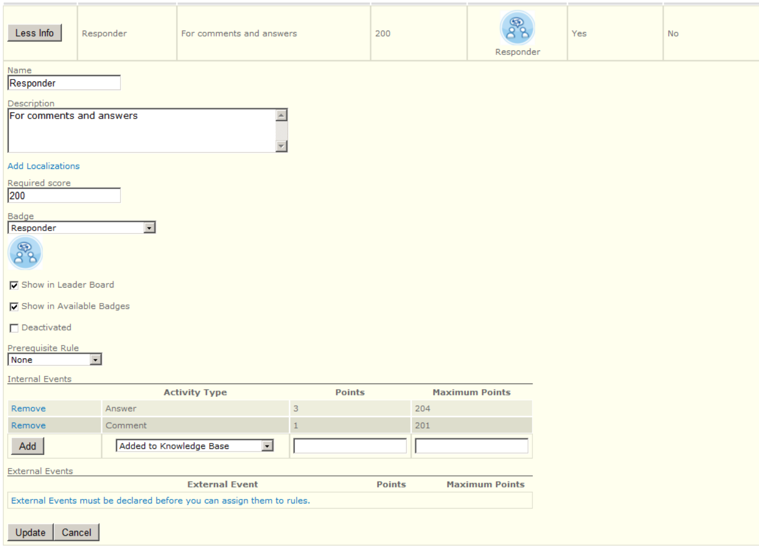

*Screenshot 669: Click More Info*

This displays more details about the rule composition and its localizations, if any.




*Screenshot 670: Click 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.



*Screenshot 671: Edit rule and click Update button*

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 Aurea 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):

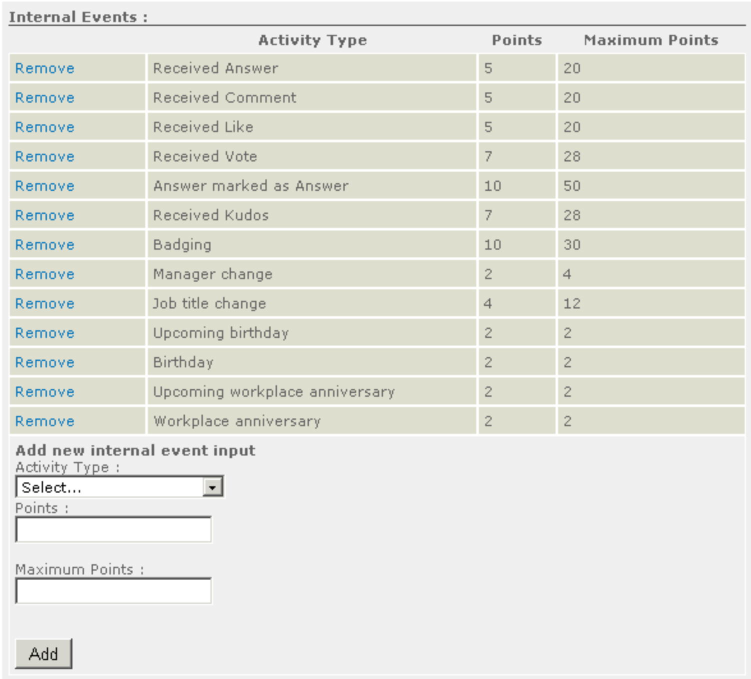
- Job title change
- Manager change
- Upcoming birthday
- Birthday
- Upcoming workplace anniversary
- Workplace anniversary
- Profile update
- New colleague
- New membership
- Status message
- Kudos
- Sent kudos

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 |



*Screenshot 672: Interface for identifying which events are a part of the rule's scoring*

To add a new event,

1. Open the **Activity Type** drop down. You can see all internal event types that can be added to the rule (and that are not already part of it).

2. 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.

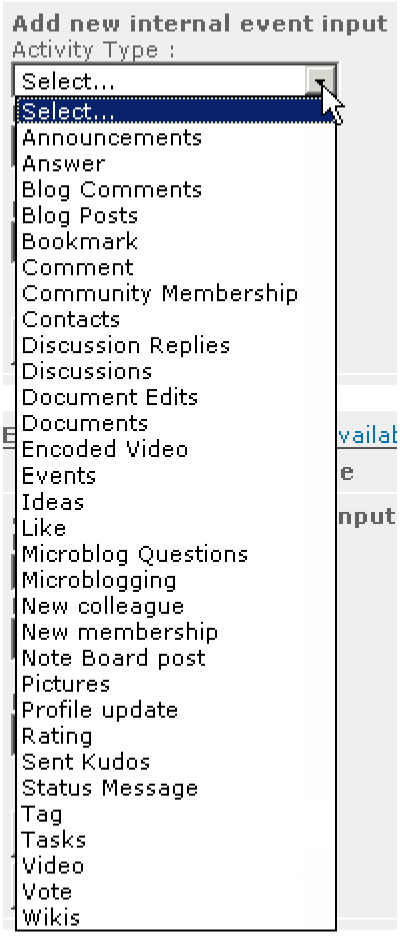
3. For "Maximum Points", enter a limit on the number of points that can be accumulated by any one user by doing events of this type, toward awarding a badge by this rule. (Note: "Maximum Points" does not play a role in calculating leader board scores). Use the Maximum Points setting when you want to ensure that a user must perform more than one event type to earn the badge by that rule.

4. 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.

In the examples pictured here, the 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.

- **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.
- **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.




*Screenshot 673: Select and internal event from dropdown*

> **Note:**
> 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.
> 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 Aurea 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.

> **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 in put to the rule, click the **Add** button. The event type should now display with the list of existing event inputs.

> **Note:**
> 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.

> **Important:**
> 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 Aurea Social of events that occurred in them through the "TriggerInput" API call.

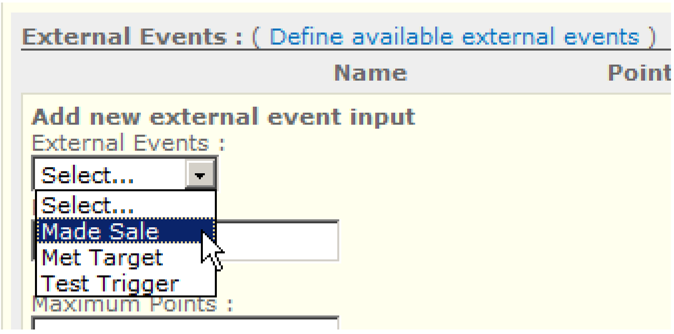
To get this up and running, you must follow the directions in the section Adding a new external input in the topic Defining, modifying, and using inputs for external actions . Once operational, you can include the external events that Recognition knows about in the scoring for a rule.

You can do so when creating or editing a Recognition rule.

1. Go to the External Events interface.


*Screenshot 674: External Events interface*

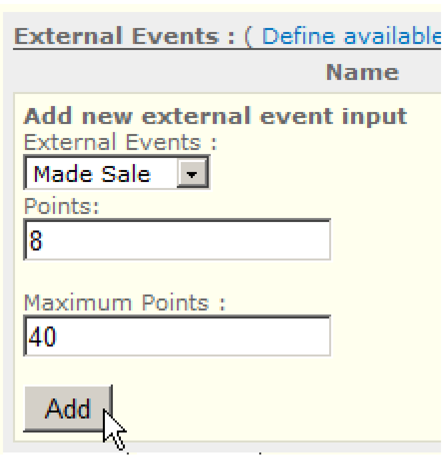
2. Click the External Events dropdown to see the list of available external inputs that have already been identified to Spotlight. If you don't see the event you need, change the contents of this list by clicking the **Define available external events link**, and following the instructions in the section Adding a new external input in the topic Defining, modifying, and using inputs for external actions.




*Screenshot 675: Select an external event*

3. 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.

4. 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.




5. 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.

**Note:**
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.

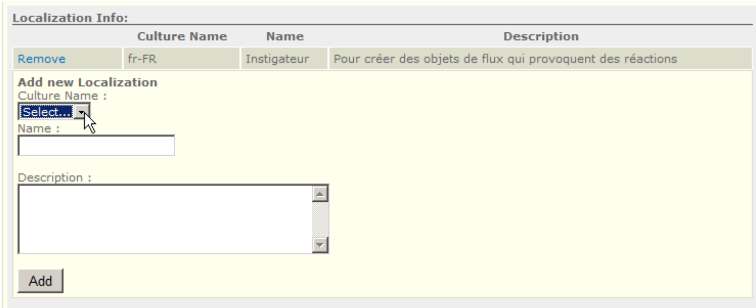
**Important:**
Remember to click the Update button for the rule after this and all other edits to the rule are complete, to commit all changes.

## 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.

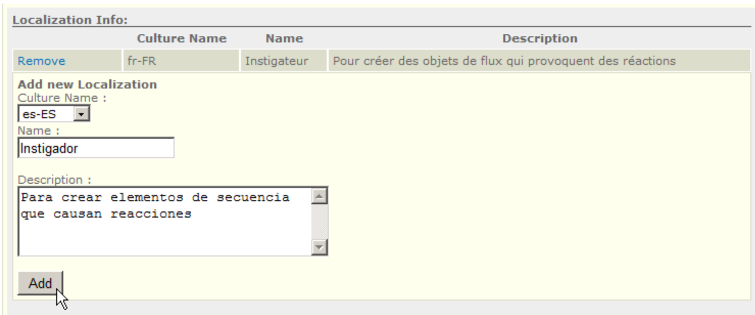
To do this, when creating or editing a rule, do the following:

1. 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.



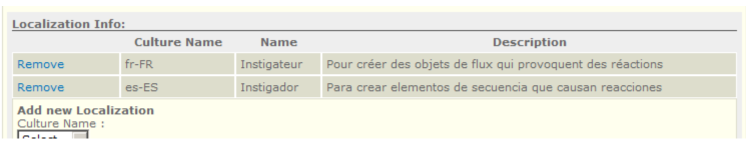

*Screenshot 676: Select a culture name*

2. Set the Culture dropdown to the language you are translating into, then add the translated name and description and click **Add**.




*Screenshot 677: Add the translated name and description*

3. The new translation should be instantly added to the existing list of localizations, at the top of the Localization Info section.




*Screenshot 678: New translation is added*

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.

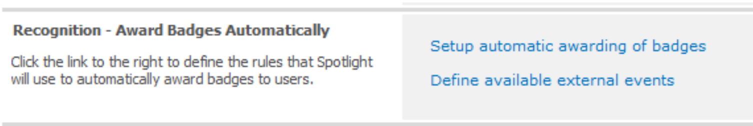
#### Defining, modifying, and using inputs for external actions

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 Aurea 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 Aurea 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.

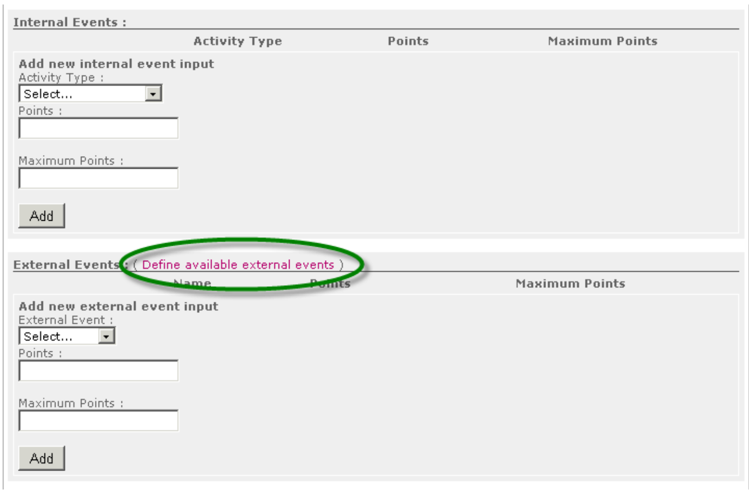
There two ways to access the page where you define and modify these inputs

» In the **Spotlight Management** page, find the **Recognition – Award Badges Automatically** section and click the **Define available external events** link.



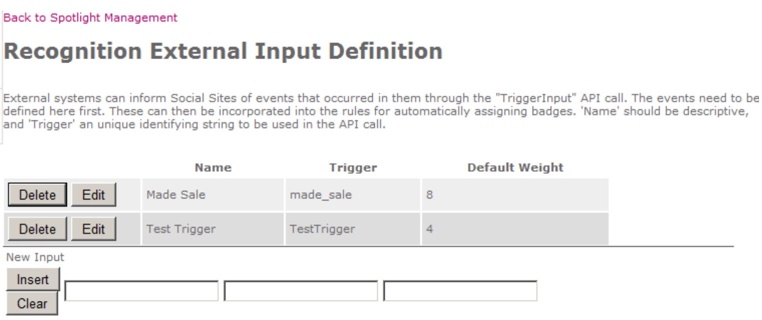

*Screenshot 679: Click the Define available external events link in Recognition – Award Badges Automatically section*

» 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.




*Screenshot 680: Click the Define available external events link at the top of the External Events section*

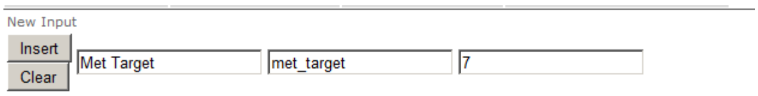
Either of these will bring you to the **Recognition External Input Definition** page. On this page you'll see a list of any external input identifiers that have already been defined, and below this the input box for a new identifier.




*Screenshot 681: Recognition External Input Definition page*

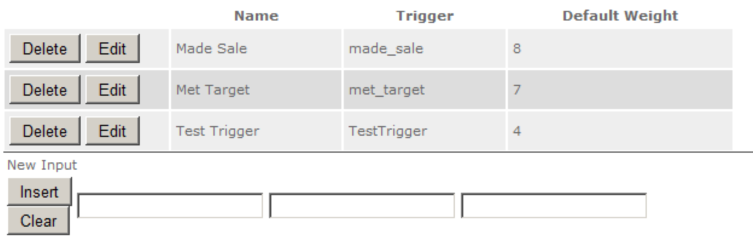
## Adding a new external input

The inputs are in the same order as the listed definitions. From left to right, enter a friendly name that can 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.




*Screenshot 682: Click Insert*

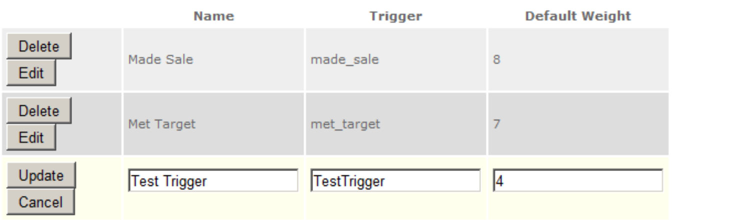
Your new external input is added to the list.




*Screenshot 683: New external input is added to the list*

## 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.




*Screenshot 684: Click Edit button*

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:

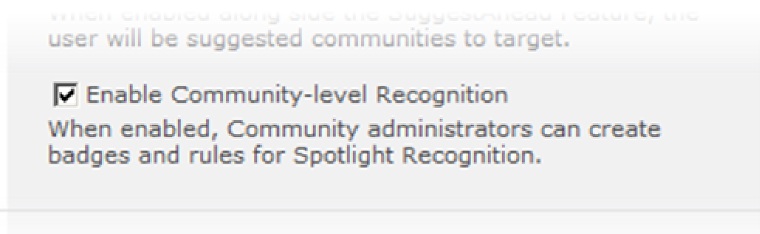
```
string serverName = "http://servername"; //the root of the wfe hostname where spot-
light is installed
string trigger = "TriggerValue";         //the value set up in Manage External Inputs
string forUser = @"domain\accountname";   //the user who performed the action

var request = (HttpWebRequest)WebRequest.Create(string.Format("{0}/_vti_bin/ng/spot-
light/spotlightservice.svc/TriggerInput/?trigger={1}&foruser={2}", serverName, trig-
ger, 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:




*Screenshot 685: Enable checkbox to allow community administrators to create badges and rules for spotlight recognition*

If you uncheck this, the following changes happen:

- The **Spotlight Administration** link is no longer available on any community **Admin** tab.
- Any existing rule-based community badges stops accumulating points based on user activity.
- **Community Leader Board** and **Available Community Badges** web parts displays 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 still displays on the user's profile.

#### Awarding badges manually

Your organization may want to recognize achievements or behaviors that an automatic rule can't calculate.

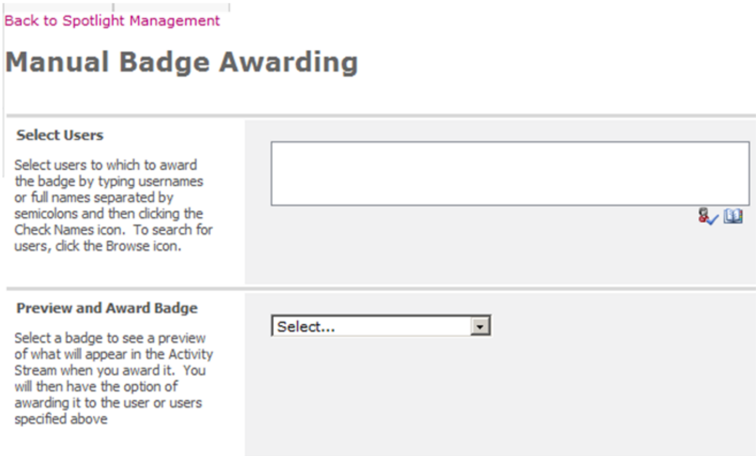
To allow you to recognize users for any achievement, badges can be manually assigned to users.

You can assign a badge to multiple users at once, and see a preview of what the award looks 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, do the following:

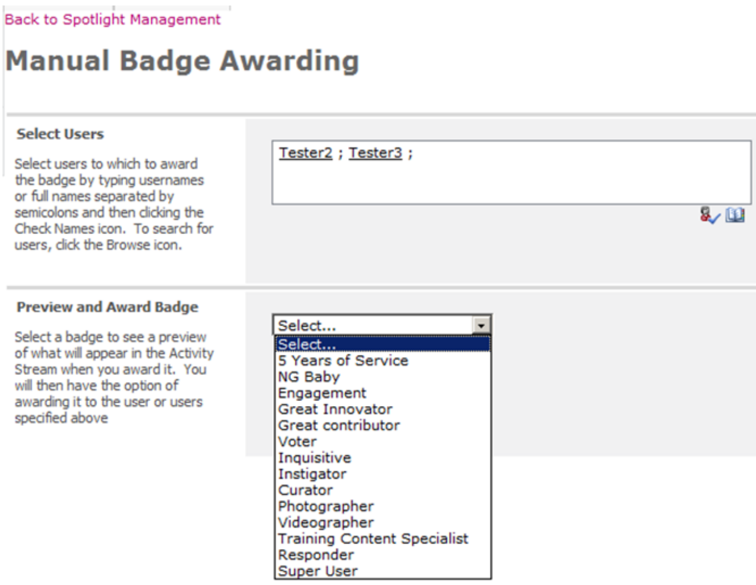
1. Go to the **Recognition–Award Badges Manually** section in the Spotlight Management page, and click **Manually Award Badges**. **Manual Badge Awarding** page is displayed.




*Screenshot 686: Manual Badge Awarding page*

2. In the **Select Users** section enter the full names or usernames of the users you want to manually award a badge to. The left-most icon below the box verifies the names. The rightmost icon allows looking up users.

3. Select the badge you want to award.




*Screenshot 687: Select badges*

4. Once you've done this, you can preview what the activity stream announcement of the award looks like.


*Screenshot 688: Preview the activity stream announcement*

5. Click **Award Badge to User(s)** to finish.

## Community Badges

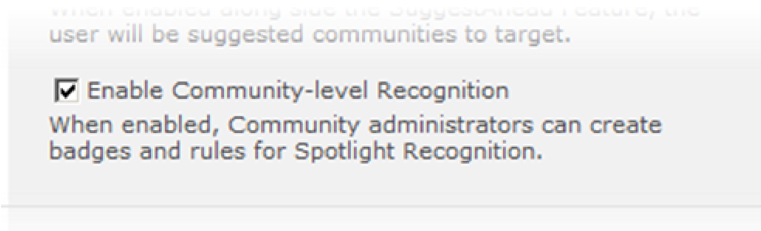
Community administrators can set up badges that are awarded based on activity within a particular community. Display of these badges in the stream is limited to members of the community to which they belong, and to visitors to the community site. They are, however, publicly viewable via the **Earned 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:



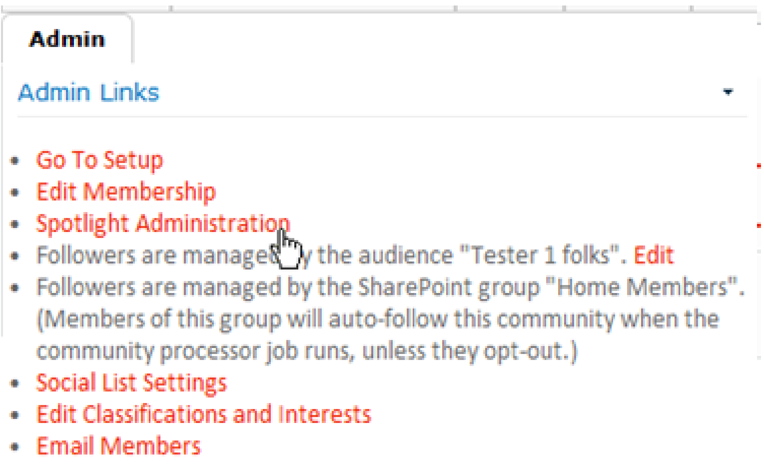

*Screenshot 689: Enable checkbox to allow community administrators to create badges and rules for spotlight recognition*

If you uncheck this, the following happens:

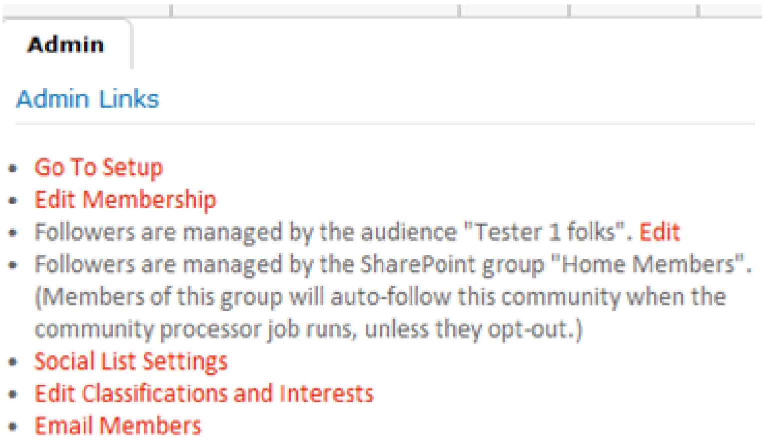
» The Spotlight Administration link no longer be available on any community Admin tab.

» Any existing rule-based community badges stops accumulating points based on user activity.

» Any **Community Leader Board** and **Available Community Badges** web parts that have previously been deployed displays a message stating that community-level recognition features have been disabled and that the web part should be removed or hidden.




*Screenshot 690: Spotlight Administration link visible on community Admin tab*




*Screenshot 691: Spotlight Administration link not available on community Admin tab*

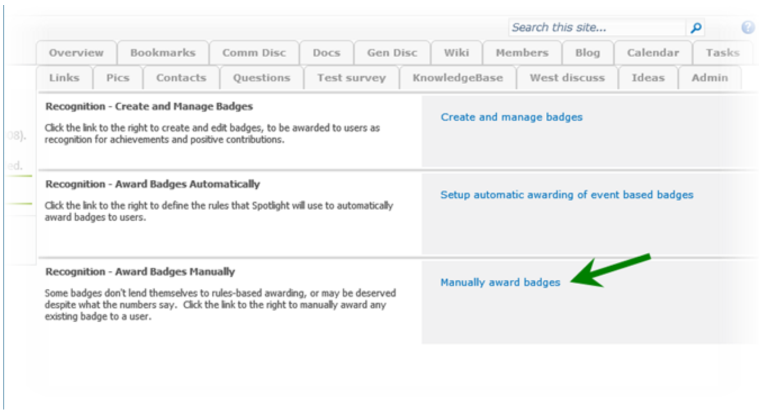
Any public community badges already awarded still displays on the user's profile.

**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:


*Screenshot 692: Click Spotlight Administration*

This opens an administration page which is a limited version of the global Spotlight Administration page:




*Screenshot 693: An administrative page is opened*

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 pre-populated 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:

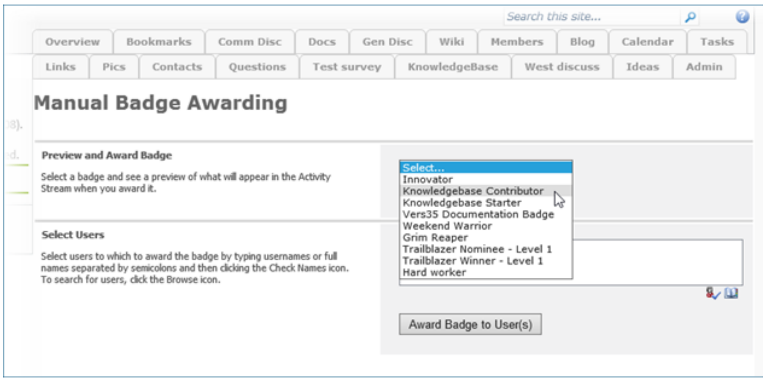
- Birthday
- Job title
- Kudos
- Manager change
- New colleague
- New membership
- Profile update
- Sent kudos
- Status message
- Upcoming birthday
- Upcoming workplace anniversary
- Workplace anniversary

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.

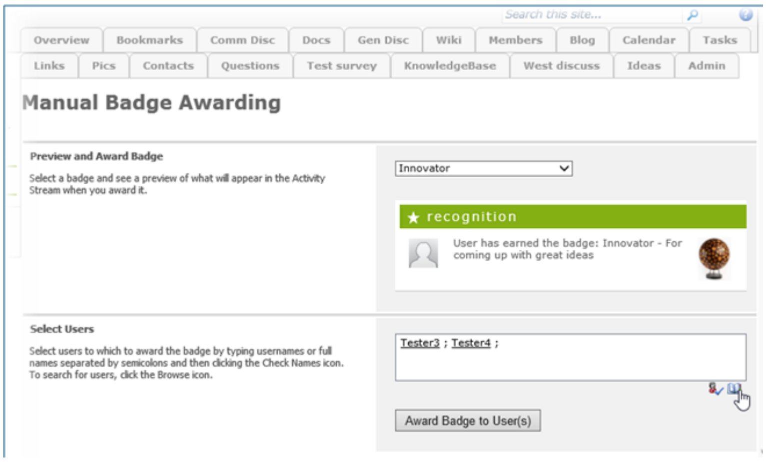



*Screenshot 694: Manual Badge Awarding*

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.

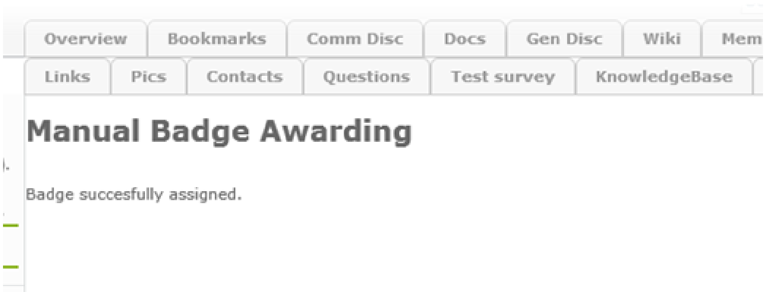
In the next section, you select community members who are to receive the badge using SharePoint's people picker control.

**Note:**
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.



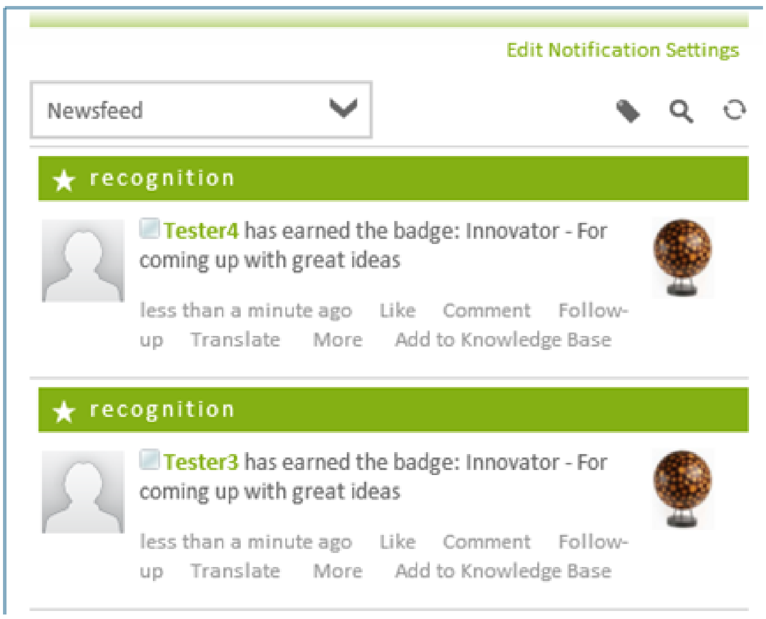

*Screenshot 695: Select community members*

When you have selected the correct recipients, click the **Award Badge to User(s)** button. If the award succeeds, you see the success message.

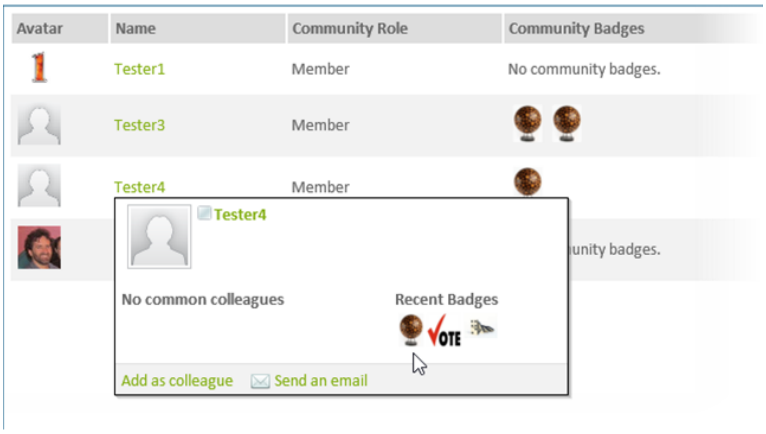



*Screenshot 696: Success message*

The badge award appears in the community stream, on the **Members** tab in the **Community Badges** column, on the user's mini-profile, 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 is only visible to community members.



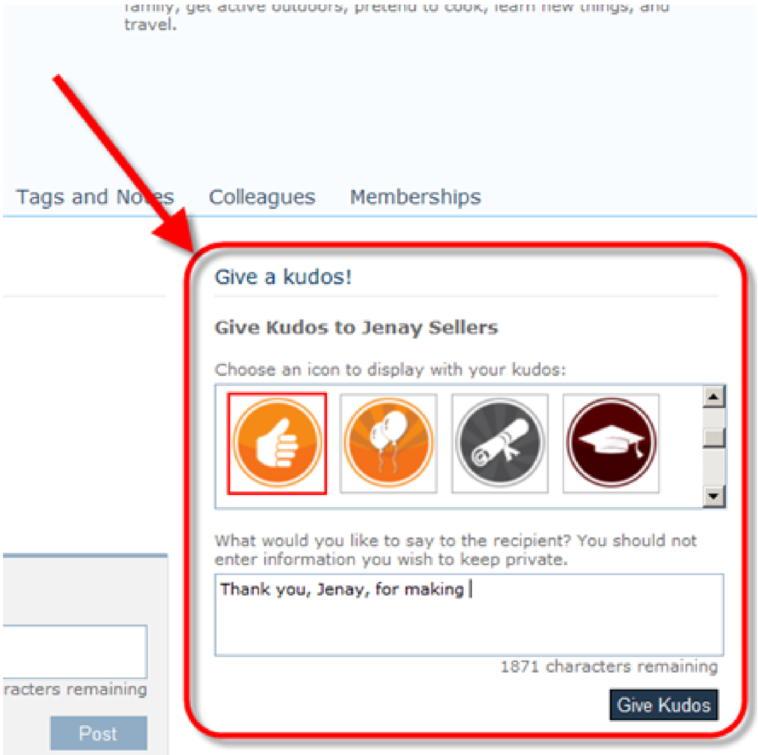

*Screenshot 697: Badge awards appear in community stream*




*Screenshot 698: Private badges are 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:




*Screenshot 699: Kudos badge*

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 appears in the activity stream for that person and her followers, alongside whatever icon you chose to use:


*Screenshot 700: Kudos*

There are a set of 14 icons available by default for use with in kudos. Spotlight administrations 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.

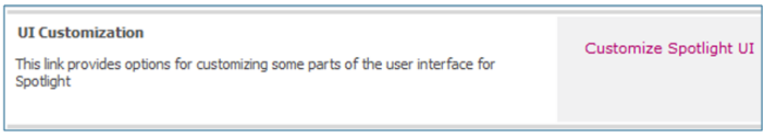
Kudos badges can only be defined at the global level (there are no community-level kudos badges).

## 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.

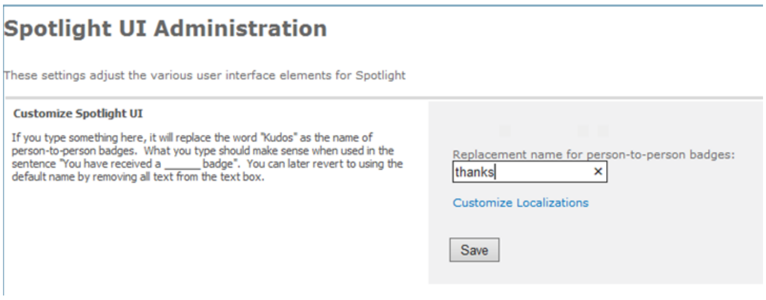
To do so, follow the below steps:

1. On the **Spotlight Administration** page click the **Customize Spotlight UI** link in the UI Customization section.




*Screenshot 701: Customize Spotlight UI link*

2. On the **Spotlight UI Administration page** type in a new word to replace "kudos".

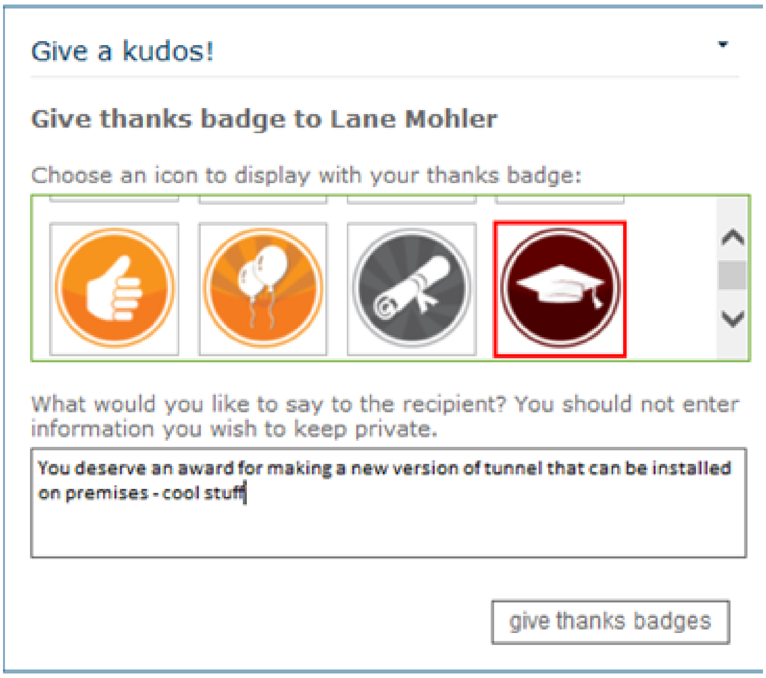



*Screenshot 702: Spotlight UI Administration*

3. 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:**
> 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.




*Screenshot 703: "Kudos" replaced with new word*

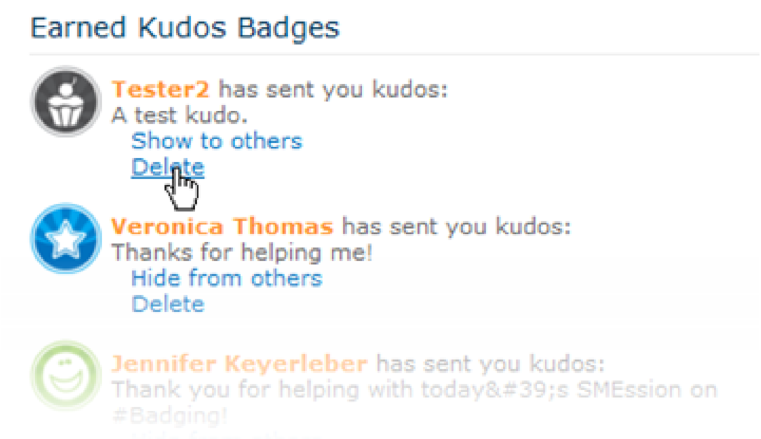
## Deleting earned Kudos

### Deleting Kudos awarded to you

When viewing your earned kudos badges on your own profile, you can see a **Delete** option under each.

Click **Delete** to remove the kudos badge. The badge is permanently removed from view for all users, including yourself.

The activity stream event announcing the award of the kudos badge is also removed – but only if the event occurred after upgrading to version 4.0 (or higher) of Aurea Social.



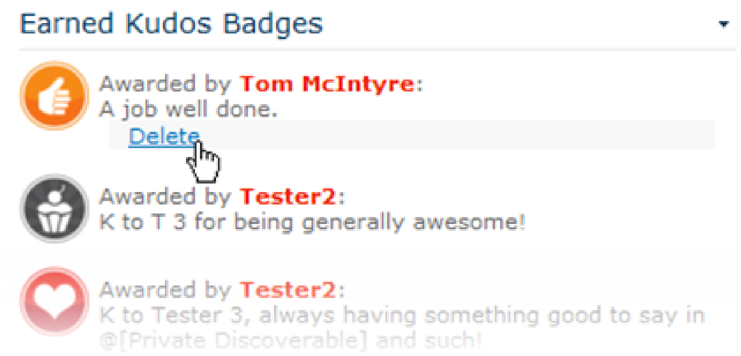

*Screenshot 704: Click **Delete***

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.

### Deleting kudos that you awarded to someone else

You can also delete any kudos you awarded by visiting the profile of that person, 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 Aurea Social.




*Screenshot 705: Click Delete*

## 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.


*Screenshot 706: Progressive chain of badges*

The above picture demonstrates an examble 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 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:**
> 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.


*Screenshot 707: Branched chain of badges*

**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.

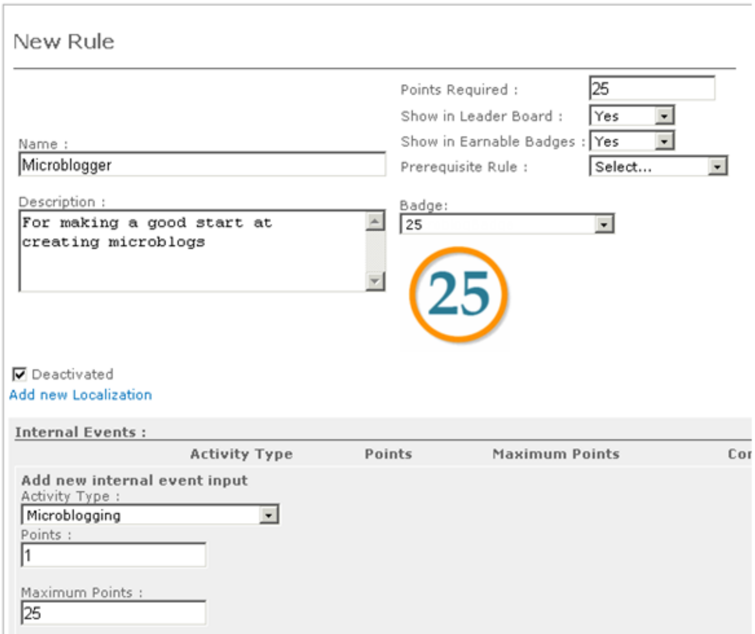
1. Go to either the global Spotlight Management page or the community Spotlight Management page.

2. Click Create and manage badges to set up your badge icons, if need be,

3. 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:




*Screenshot 708: Define first badge rule*

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.

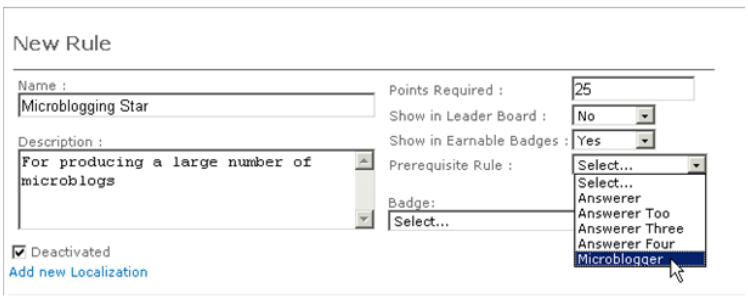
It is recommended to have **Show in Available Badges** set to **Yes** for all badges in the chain. Otherwise, a user will perceive having reached the end of the chain, upon reaching the first badge rule with a No for this setting.

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:




*Screenshot 709: Define next badge rule*

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:


*Screenshot 710: Check the **Show Deactivated Rules** option*

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.

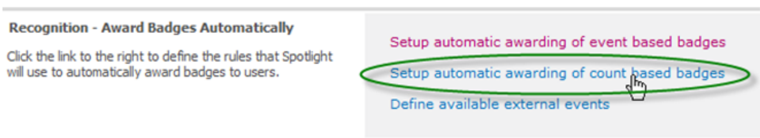
Users who have been good about doing these things before the badge rule is activated do not have as much of an honest opportunity to earn these badges. This can amount to being punished for being and "early adopter".

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**.

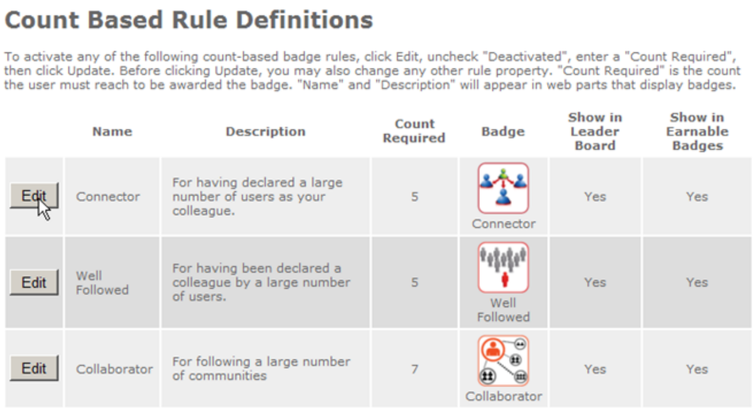
The final one of these is awarded for having been declared as a colleague by a large number of other people. By default this one is called **Well Followed**, but you may change this to something else, such as **Vogue**.




*Screenshot 711: Setup automatic awarding of count-based badges*

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 does 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 |

*Screenshot 712: Count Based Rule Definition*

## 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.

To view report, do the following:

1. Go to the **Reports** section in the **Spotlight Management** page, and click **Admin reports on Recognition**.
2. **Spotlight Badge Reports** page is opened. You can make selection from **Select A Report** dropdown.

Two additional reports, Badge Detail and User Detail, are not available 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.


*Screenshot 713: Select report*

### 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.

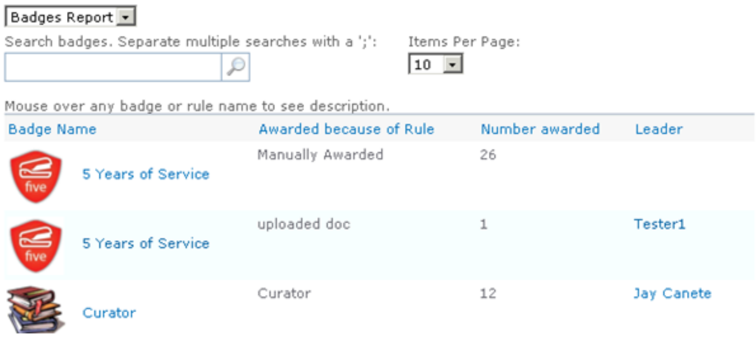
**Number awarded** shows the number of different users who have earned the badge by that rule (or manually).

**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.




*Screenshot 714: Badges report*

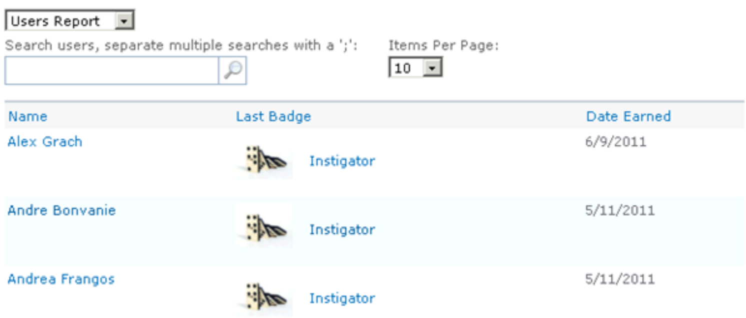
## Users Report

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.



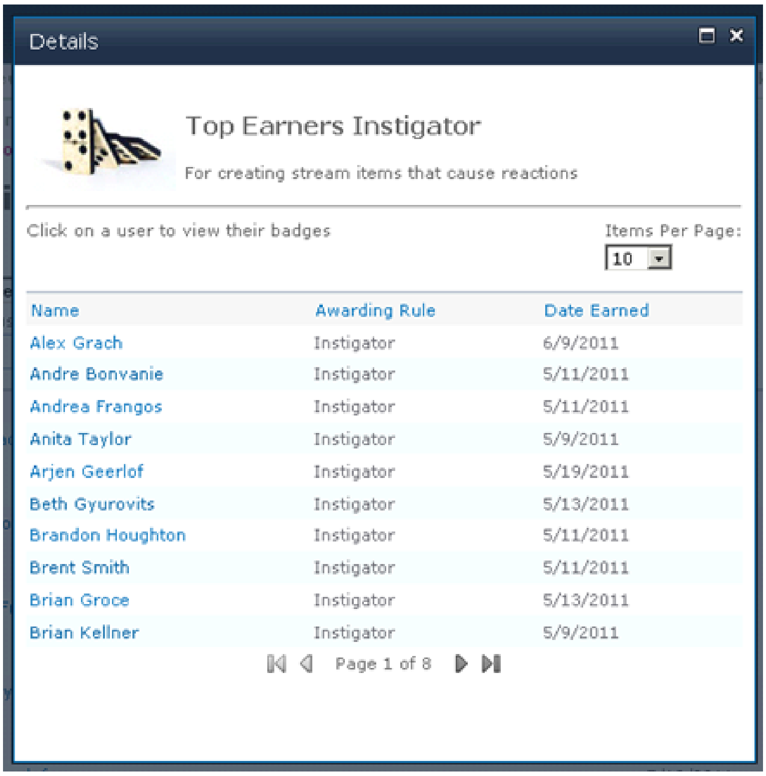

*Screenshot 715: Users report*

## 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 sorts by that column. Clicking on the name of any user displays the user detail report for that user.




*Screenshot 716: Batch Detail Report*

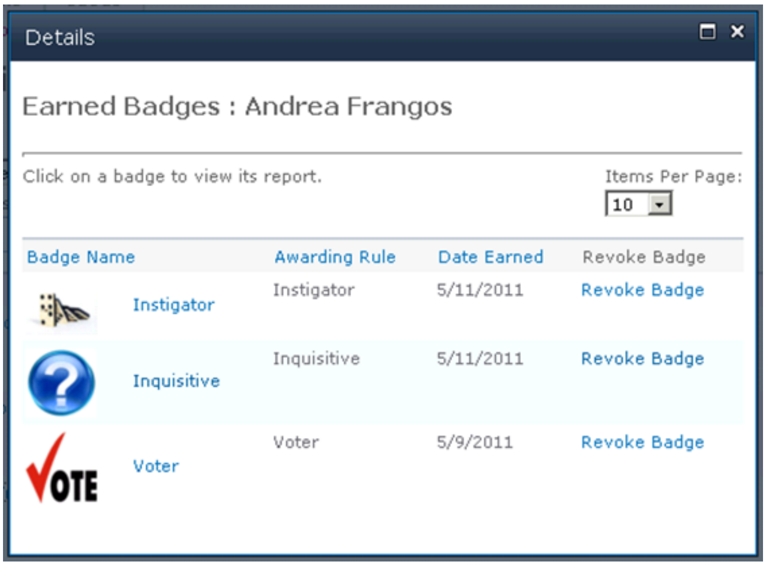
## User Detail Report

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 sorts by that column. Clicking on any badge displays 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.




*Screenshot 717: User Detail Report*

### 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.

For more information, see 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.

## Aurea 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:

- Video player width and height
- **Stretch:**
  - **None:** The content preserves its original size.
  - **Fill:** The content is resized to fill the destination dimensions. The aspect ratio is not preserved.
  - **Uniform:** The content is resized to fit in the destination dimensions while it preserves its native aspect ratio.
  - **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.
- **Show statistics option:** When enabled shows the video statistics.
- **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.
- **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.
- **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.
- **Start playback on average quality track:** When enabled (default), the video starts streaming at the average bit rate instead of the lowest streaming rate.

### Video Stream and Multi-farm deployments

Video Stream runs 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 needs to be an encoding service and a streaming service per farm.

The encoding service only encodes videos contained in the local farm. The streaming server only streams videos that are contained in the local farm. The encoding service and streaming service can be deployed alongside other services.

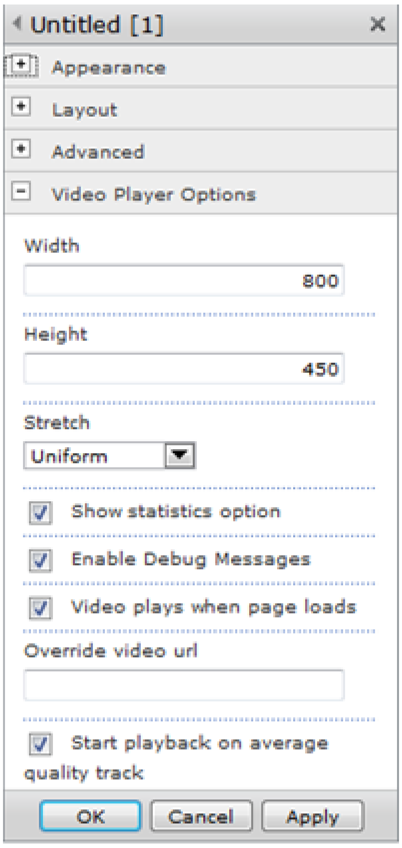
In a multi-farm configuration, videos are played from the streaming server on the farm which contains the video.

## 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:

- **Video player width and height**
- **Stretch:**
  - **None:** The content preserves its original size.
  - **Fill:** The content is resized to fill the destination dimensions. The aspect ratio is not preserved.
  - **Uniform:** The content is resized to fit in the destination dimensions while it preserves its native aspect ratio.
  - **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.
- **Show statistics option:** When enabled shows the video statistics.
- **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.
- **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.
- **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.
- **Start playback on average quality track:** When enabled (default), the video starts streaming at the average bit rate instead of the lowest streaming rate.




*Screenshot 718: Video player options*

## 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**.

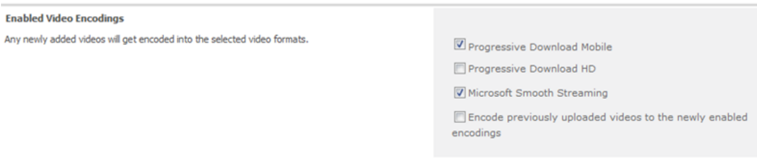
## Enabling mobile and other encoding formats

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.

> **Note:**
> Two important things:
> - it may take a while for Video Stream to encode all original videos into the mobile format and
> - it is not possible to turn mobile encoding off once turned-on.




*Screenshot 719: Here's what the Mobile Encoding setting section looks like after you have enabled mobile support*

### HTML5.0

This section also allows you to enable Progressive Download HD which is used for HTML 5.0 support.

### SmoothStreamingforthebrowser

To enable encoding for Smooth Streaming, check the **Microsoft Smooth Streaming** box. It's checked by default.

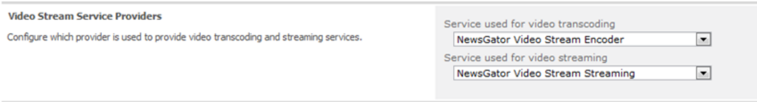
If you decide to enable any of these, be sure to check '**Encode previously uploaded videos to the newly enabled encodings**' if you want existing videos to be encoded to those formats.

> **Note:**
> 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 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 see frequent buffering.


*Screenshot 720: Enable the **Microsoft Smooth Streaming** checkbox*

## Video Stream Service Providers

Video Stream supports custom encoding and streaming service providers and support other out of the box options in the future. To enable a custom service provider, select accordingly below.

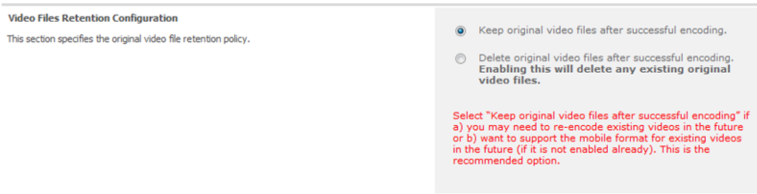



*Screenshot 721: Video Stream Service Providers*

## Original video files retention configuration

Select **Keep original video files after successful encoding** if you want to do the following:

- you may need to re-encode existing videos in the future or
- want to support the mobile format for existing videos in the future(if it is not enabled already). This is the recommended option.




*Screenshot 722: Original video files retention configuration*

## 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.


*Screenshot 723: Large file uploader*

## Metrics

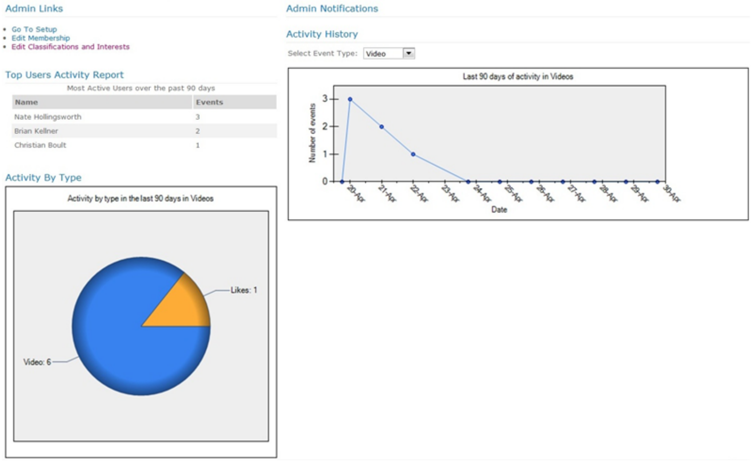
Video Stream leverages the metrics already available through Aurea Social. Video Stream has its own event indicating that a new video has been created.

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.

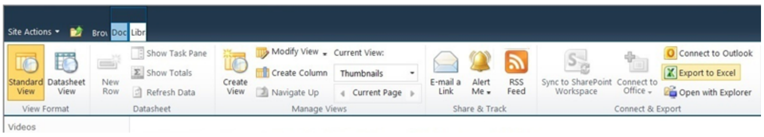
On a regular community these web parts appear under the **Admin** tab.




Screenshot 724: Activity History

## Exporting

Exporting the list of videos to Excel can also be handy at various review points.




Screenshot 725: Export to excel

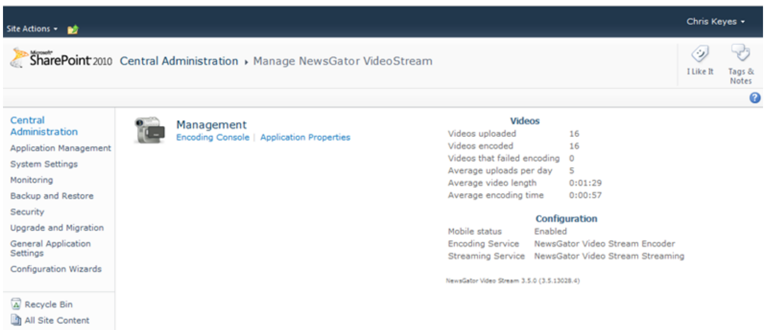
## Managing encoded videos

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.

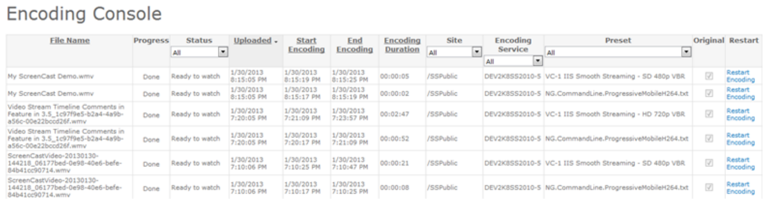
The Manage NewsGator VideoStream page contains a number of video summary statistics including:

- 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




Screenshot 726: Click on Encoding Console

Click on **Encoding Console** to view the encoding status of uploaded videos:




*Screenshot 727: Encoding console*

The encoding console lists all uploaded videos for the given farm sorted by the uploaded 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
- an option to restart encoding

There are six different encoding states:

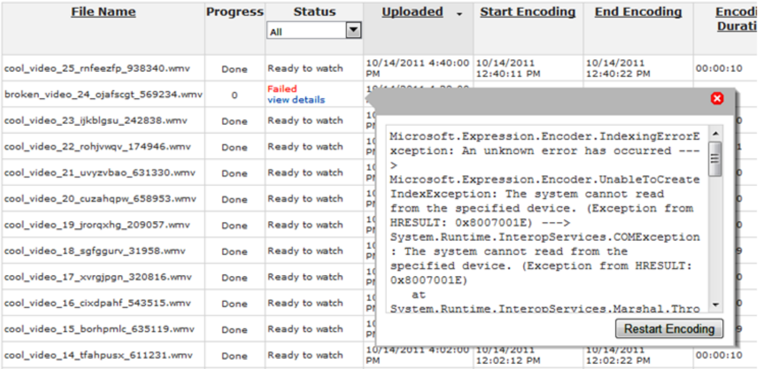
- pending
- encoding
- encoded
- failed
- cancelled
- and ready to watch

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**.



Screenshot 728: Status of uploads

## Verifying your configuration and making other changes

The NewsGator Video Stream Service Application management area in Central Administration supports a couple of key features:

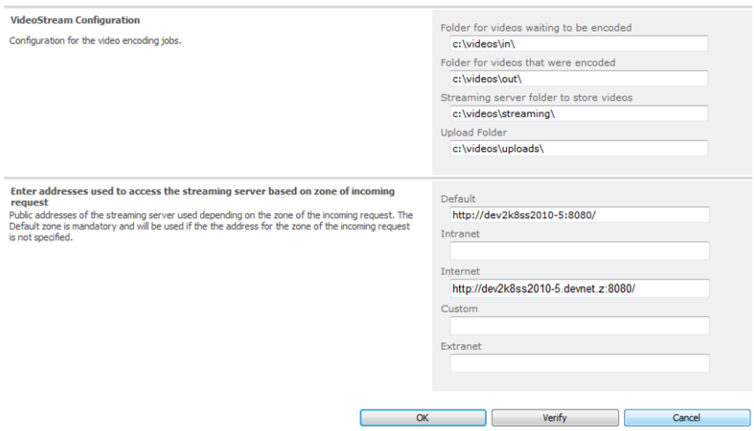
- Configuration verification
- Configuration changes

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.

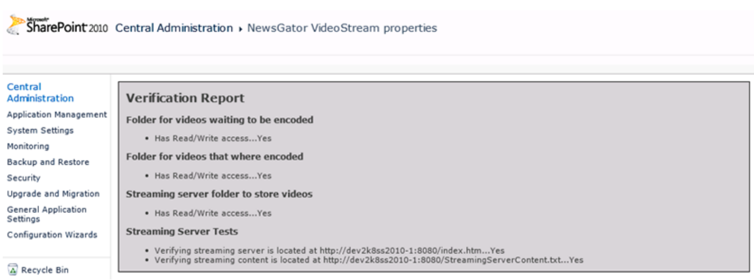
Clicking on the Verify button produces a Verification Report. In future releases, this report supports other aspects of the configuration including encoding and streaming server access to the Video Stream video database.

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.




Screenshot 729: VideoStream configuration




Screenshot 730: Verification report

## Third-party video solution integration

### Azure Media Services (SharePoint 2013 only)

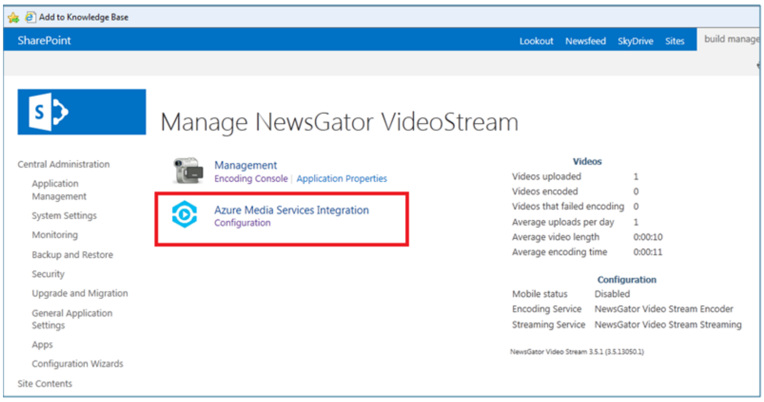
Video Stream supports an option to use Azure Media Services (AMS) in lieu of its native support for video file storage, encoding and streaming.

Azure Media Services can be used to replace file storage and/or encoding and/or streaming.

To enable AMS, you have to configure the AMS properties and then set the Video Stream Service Providers accordingly.

To configure AMS support, do the following:

1. Go to **Central Administration > Manage Service Applications > NewsGator VideoStream Service Application**.
2. Select **Configuration** under **Azure Media Services Integration**.




*Screenshot 731: Manage NewsGator VideoStream*

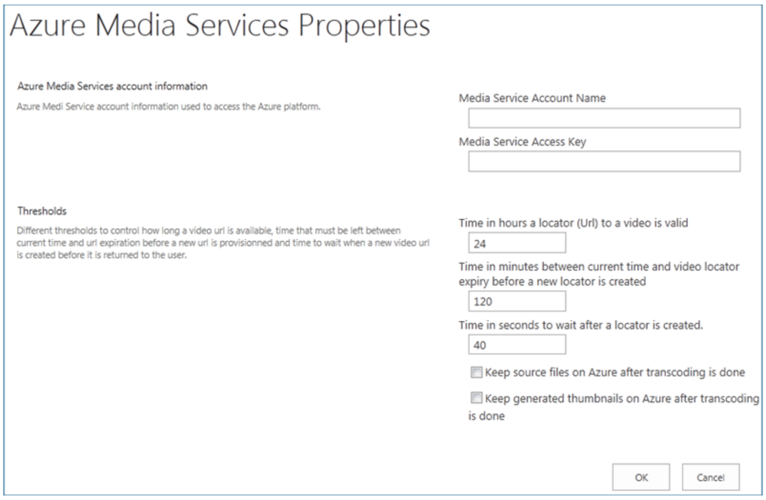
To access Azure Media Services you have to specify your **Media Service Account Number** and **Media Service Access Key**.

You can also change a number of specific thresholds that support:

- how long a video url is available (default is 24 hours)
- the amount of time that must be left between current time and url expiration before a new url is provisioned (default is 120 minutes)
- 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):

- Keep source files on Azure after transcoding is done
- Keep generated thumbnails on Azure after transcoding is done

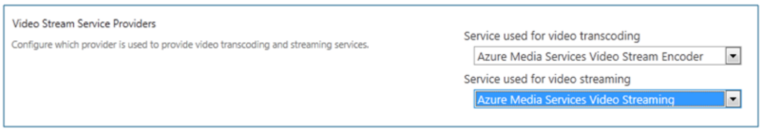



*Screenshot 732: Azure media services properties*

To actually enable the use of Azure Media Services, do the following:

1. Go to **Central Administration > Manage Service Applications > NewsGator VideoStream Service Application > Application properties**.

2. On the **Video Stream Service Providers** section, choose **Azure Media Services Video Encoder** from **Service used for video transcoding** dropdown and **Azure Media Services Video Streaming** from **Service used for video streaming** dropdown.




*Screenshot 733: Video Stream Service Providers*

## 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.

For further details, see Aurea Social Video Stream Kontiki integration.

## Brightcove integration

Video Stream supports a feature that integrates with Brightcove for both uploading and playback of video.

For further details, see Aurea Social Video Stream BrightCove integration.

## Kaltura integration

Video Stream supports a feature that integrates with Kaltura for both uploading and playback of video.

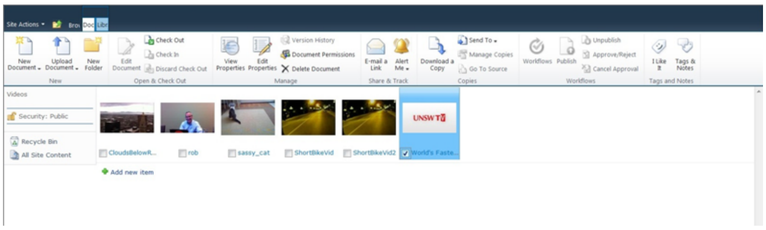
Please see Aurea Social Video Stream Kaltura Integration.

## 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.

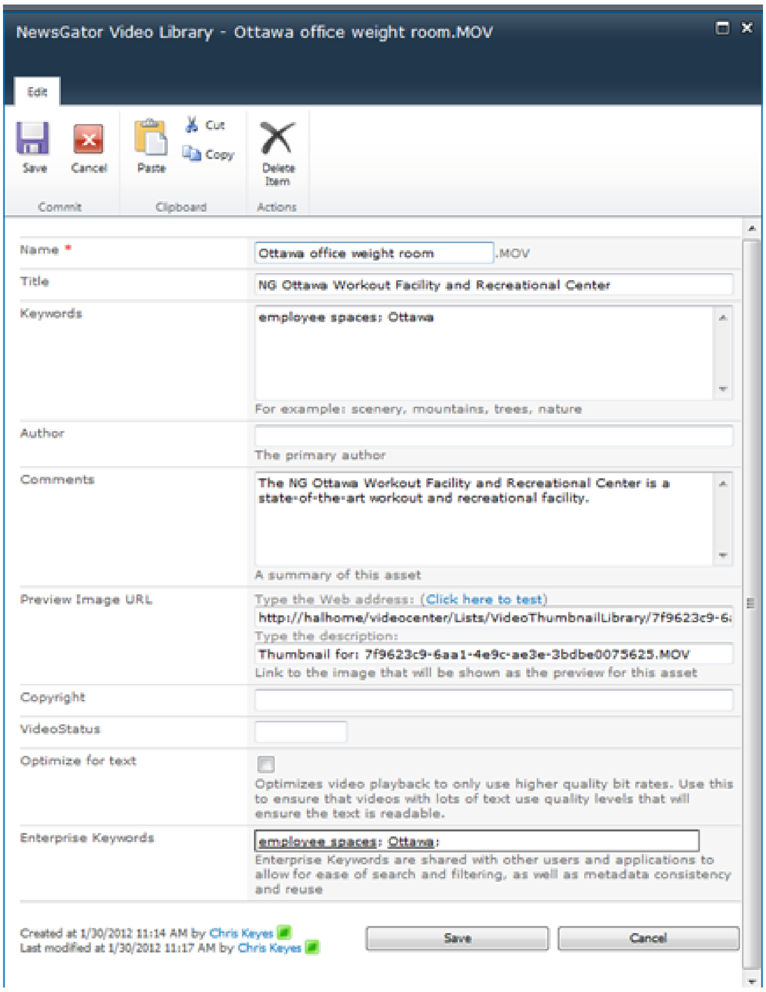
## Video List management

Sometimes it may be helpful to work directly in the video list. End users can view this list directly.



*Screenshot 734: Video List Management*

A user could change some of the properties of the video or upload a replacement video.




*Screenshot 735: You can change the properties of the video or upload a replacement video*

## Aurea 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, do the following:

1. Go to Sharepoint **Central Administration -> Manage Service Applications -> NewsGator VideoStream Service Properties** page.

2. Click the **Verify** button. The Verification Report appears. 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.

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The easiest way to verify the major Video Stream settings is to use verification functionality on the Video Stream service application properties page.

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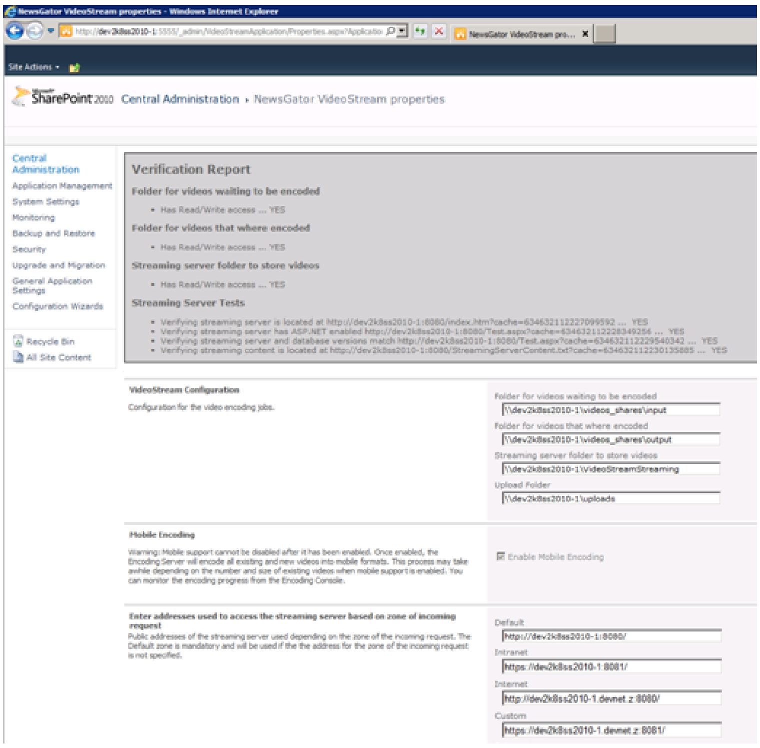
> **Note:**
> The verification feature works only if used from the Default Zone.




*Screenshot 736: Verification functionality on the Video Stream service application properties*

#### Top-level overview of Video Stream workflow

### Video Is Uploaded By User

For more information on diagnosing issues with this step, see Video Upload.

### SharePoint job copies Video to Encoding Service Input Folder.

The Video Stream Management Job copies any uploads 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 topic SharePoint job copies Video to Encoding Service Input Folder.

### Encoding Service Encodes Video

For more information on diagnosing issues with this step, see the topic Encoding Service Encodes Video.

### SharePoint job copies Video to Streaming Server

For more information on diagnosing issues with this step, see the topic SharePoint job copies Video to Streaming Server.

### Video is Available for Viewing

For more information on diagnosing issues with this step, see Issues Viewing a Video.

#### 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 need read/write access to the Large File Uploader temporary folder.

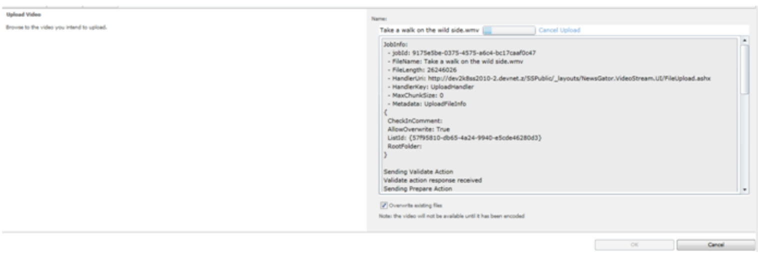
For more information on this configuration parameter see, Video Stream - SharePoint configuration.

## 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.



*Screenshot 737: Example of debug window*

#### 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.

For further details, see 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,

1. Open the Event Viewer application on the server running the **Encoding Service** and open the log Applications and **Service Logs -> VideoStream**.

2. 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**.

For further information, see Video Stream - Encoding Service, Video Stream - Encoding Console.

### An Error Occurred During Encoding

If the user who uploaded the video sees the **Video Failed Encoding** message in their activity stream.

For further details, see the Video Failed Encoding section for more information.

**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 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 Video Stream - 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.

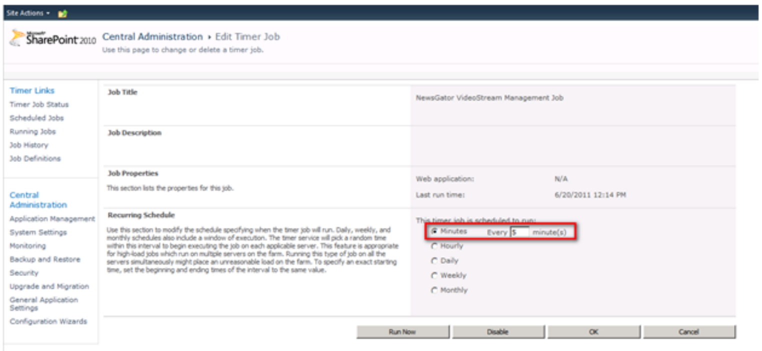
### SharePoint VideoStream Management Job Definition

Make sure the VideoStream Management Job is defined.

1. From Central Administration under Monitoring click **Review Job Definitions**.

2. Look through the list of job definitions and make sure **NewsGator VideoStream Management Job** is present.

3. Click on **NewsGator VideoStream Management Job** and make sure it is running at least every 5 minutes.



*Screenshot 738: NewsGator VideoStream Management Job*

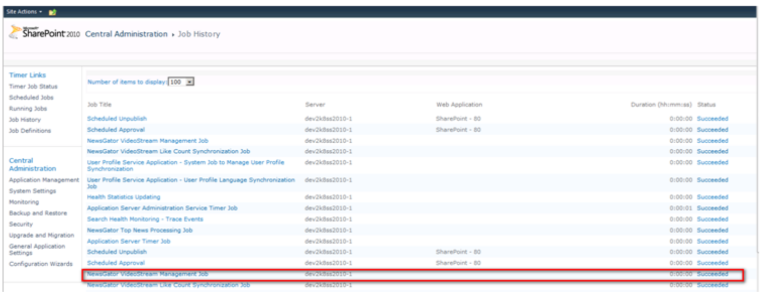
### SharePoint VideoStream Management Job is failing

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**.

4. Now click **Job History**.



*Screenshot 739: 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).

**Debugging**

## Logging

For further details on how to configure logging, see Video Stream - Encoding Service .

## 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 uses 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.

For further details, see Video Stream - Database Tables.

2. The video now shows up in the communities activity feed.

3. The video is now displayed on the Video Center page.

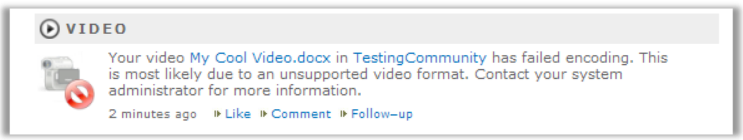
## Possible issues

### 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.




*Screenshot 740: Video failed encoding*

Use the Encoding Console to see the actual error. For further details, see 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 to support certain media formats.

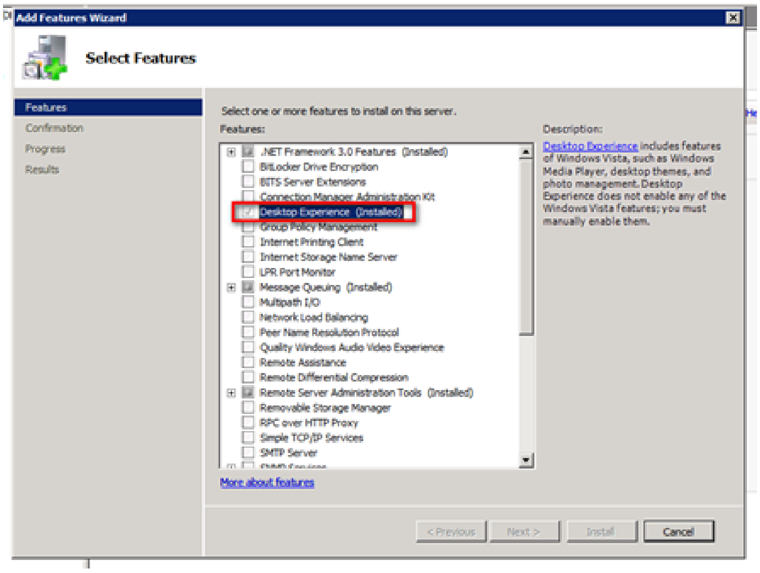
After installing QuickTime, the server needs to be rebooted before the new library is recognized by the Encoding Service.

### 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 is displayed.

The **Desktop Experience Feature** can be installed through the **Add Feature** option in **Server Manager**. The server needs to be rebooted as part of the install process of this feature.




*Screenshot 741: Add feature wizard*

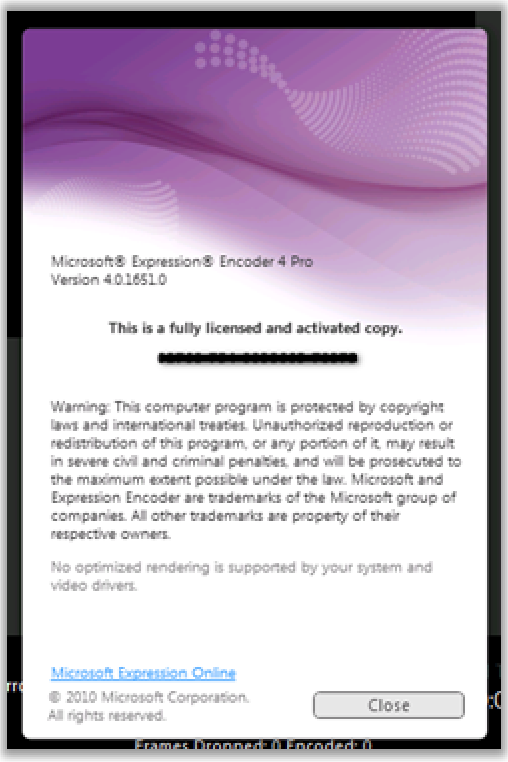
## Expression Encoder is not Pro version

If this is the case, the following error is shown in the Encoding Console.

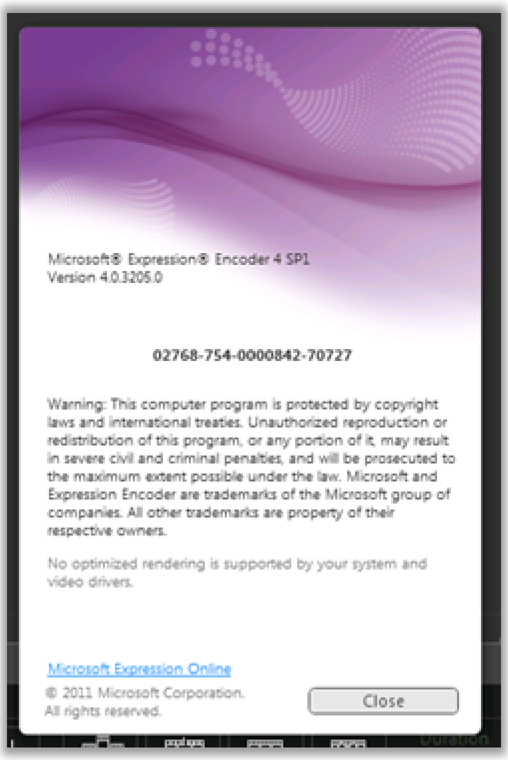
```
Microsoft.Expression.Encoder.FeatureNotAvailableException: MP4 - This
functionality is only available in the fully-featured Expression Encoder
Pro....
```

For further details, see Video Stream - Encoding Console.

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.




*Screenshot 742: Pro version of Expression Encoder*




*Screenshot 743: 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.

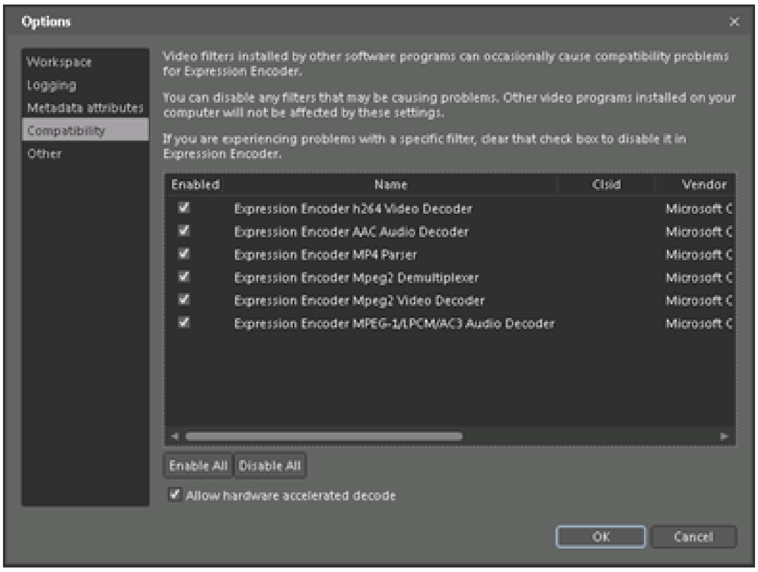
2. Open the **Microsoft Expression Encoder 4** UI.

3. Once it's open click on the **Tools > Options…** menu option.

4. Select the **Compatibility** option in the left area of the "Options" dialog.

» If no video filter is listed - You can try to disable "Allow hardware accelerated decode" and re-encode your video.

» If you have a list of video filters - You can try and disable filters from this list and re-encode your video.




*Screenshot 744: Compatibility option*

## To mitigate codec problems you should

Not install codec packs you do not fully trust. If you do install a codec pack you should

» Determine which codecs you truly need and only install those.

» Make sure only the ones you really want are enabled for use by **Expression Encoder**.

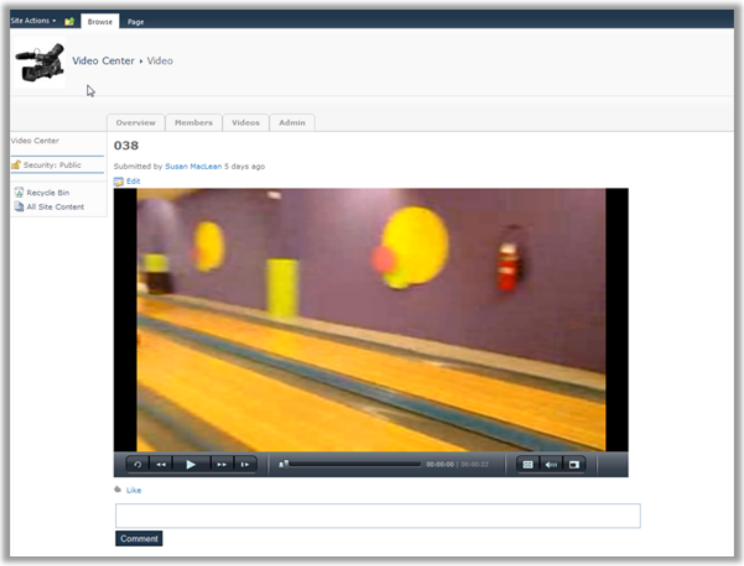
If an error is happens during the encoding process it is stored in the Video Stream database.

For further details, see Video Stream - Database Tables.

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?




*Screenshot 745: Viewing a video*

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, do the following:

1. Open the Event Viewer application on the server running the Streaming Server website and
2. Open the log Applications and **Service Logs -> VideoStream**.
3. Check for any messages in this log to help diagnose issues.

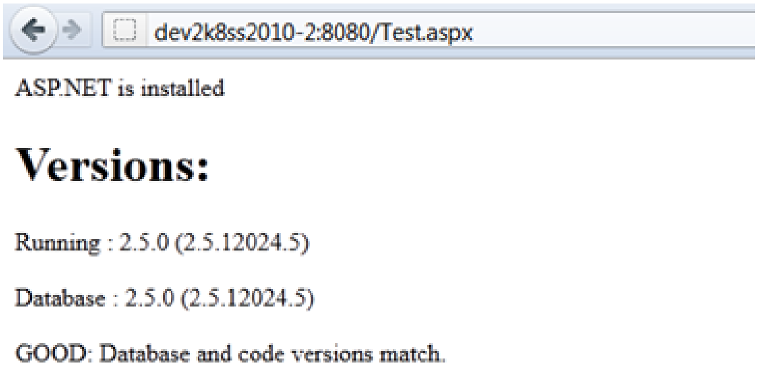
### SharePoint is not pointing to the correct streaming server

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 is pointing to the correct address. For further details, see Video Stream SharePoint Configuration guide

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.




*Screenshot 746: Append /Test.aspx in url*

5. Make sure the streaming server url is exactly the same as set in the NewsGator VideoStream application configuration window. For further details, see Video Stream SharePoint Configuration.

If videos are stored in a subfolder on the streaming server, the url should contain it, that is, `http://dev2k8ss2010-1:8000/videos`.

The url should always have the protocol part (http/https).

If this page is not displayed then, either:

- The address is wrong
- A firewall or similar is blocking access to the website
- 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.

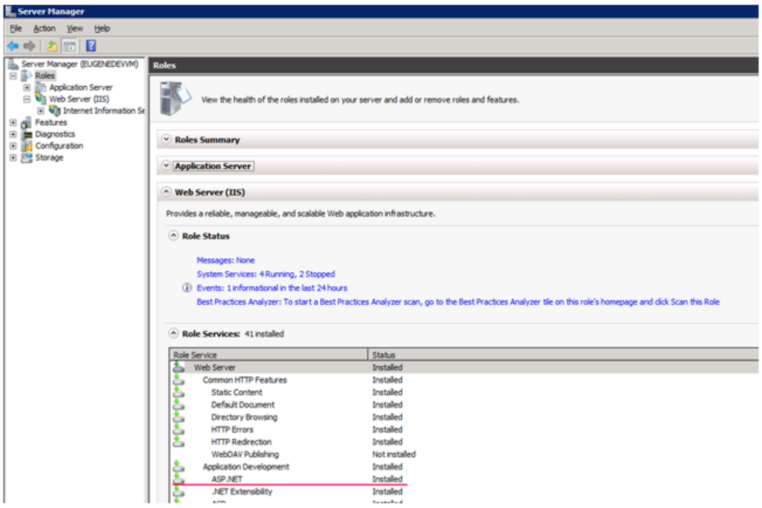
To see if ASP.NET is enabled or not, do the following:

1. Go to **Server Manager > Roles**.

2. Scroll to Web Server (IIS). The role should be installed. Esure 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 .




*Screenshot 747: Check if ASP.net is installed*

## 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.

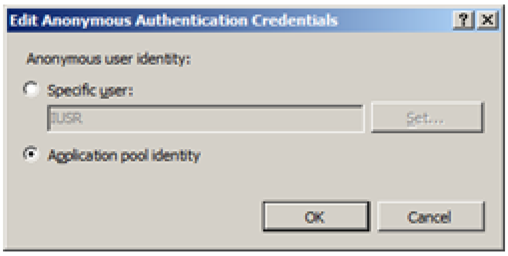
For further details, see Video Stream Server / Streaming Server Database Connection.

## Anonymous account does not have access to the video stream folder

1. Go to **IIS > Web Site > Authentication**.

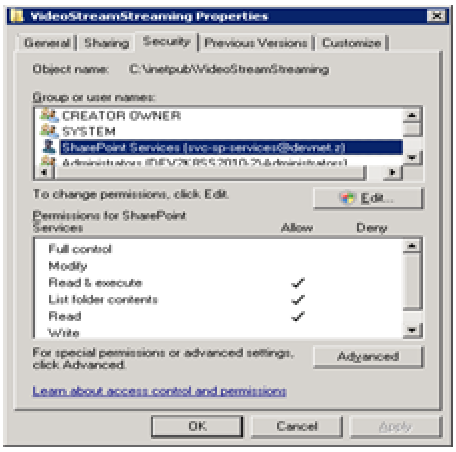
2. If **Anonymous Authentication** is set to **Enabled**.

3. Edit settings and configure anonymous to use the **Application pool identity**.




*Screenshot 748: Edit Anonymous Authentication Credential*

4. Go to the streaming folder and ensure the application pool account has rights to the folder.




*Screenshot 749: 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 does not play if sharepoint server and Video Stream server are in different zones.

| Wrong URL | Correct URL |
|---|---|
| SharePoint: http://sharepoint.companydomain.com | SharePoint: http://sharepoint.companydomain.com |
| Video Stream: http://videos:1111 | Video Stream: http://videos.companydomain.com:1111 |

- Cross-scheme URL

Videos does not play if sharepoint server is using https and Video Stream server uses http.

| Wrong URL | Correct URL |
|---|---|
| SharePoint: https://sharepoint.companydomain.com | SharePoint: https://sharepoint.companydomain.com |
| Video Stream: http://videos.companydomain.com:1111 | Video Stream: https://videos.companydomain.com:1111 |

For more information on url access restrictions in Silverlight, see URL Access Restrictions in Silverlight.

## 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), 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`.

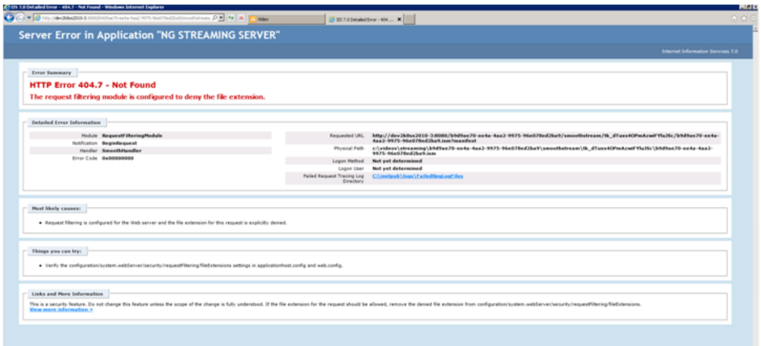
The easiest way to see if this is the case is copying the manifest URL from the Video Player’s debug logs and opening this URL in a web browser. The URL looks something like this (it is different for your deployment):

```
http://videoserver01 /1a5cad5a-5ad2-481e-adc2-cd1cadb21404/smoothstream/tk_dyeZ6b-
hL6qhsOKOyBfm6/1a5cad5a-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.

For further details, see Video Stream Server / Streaming Server Database Connection.

If you see a response exactly like the following it means request filtering is blocking the request:




*Screenshot 750: If you see a response exactly like thisit means request filtering is blocking the request*

VideoStream should add `.ism` files to the allowed list however, if entry is not working properly, you 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.

» If `.ism` is not in the list, click on **Allow File Name Extension** in the Actions pane.

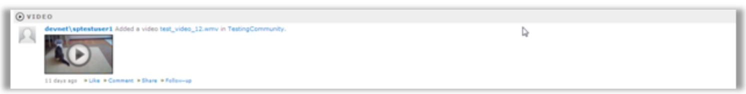
- In the **File name extension** field type: `.ism`
- Click **Ok**

» If `.ism` is in the list, make sure it is set to allowed.

**Issues Viewing a Video from the Activity Stream**

## What should happen?

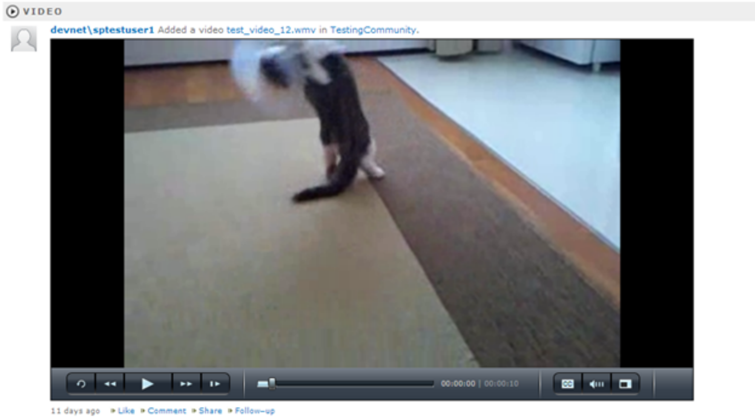
Video should be playable from a community or user's Activity Feed.



*Screenshot 751: 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.

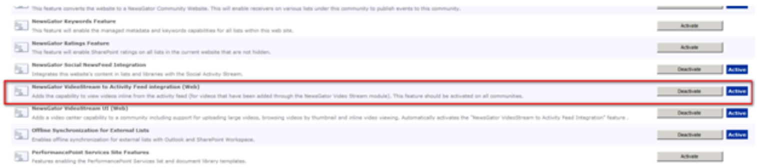
When clicking the video's thumbnail the video should play right from the **Activity Feed**.




*Screenshot 752: Video playing from Activity Feed*

## Possible issues

NewsGator VideoStream to Activity Feed Integration Feature is not activated.



*Screenshot 753: 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 Aurea Social communities and for the My Site site collection.

# 1.44 Aurea Social Enrich

## Overview

The Enrich module for Aurea 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.

## 1.44.1 Prerequisites and Compatibility

The Enrich 5.0(and later) module requires Aurea Social5.0 (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.

To use the Video Scenarios component of the Enrich module Video Stream 5.0 is also required.

## 1.44.2 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), do the following:

1. Go into **Site Settings** > **Manage Site Features**.

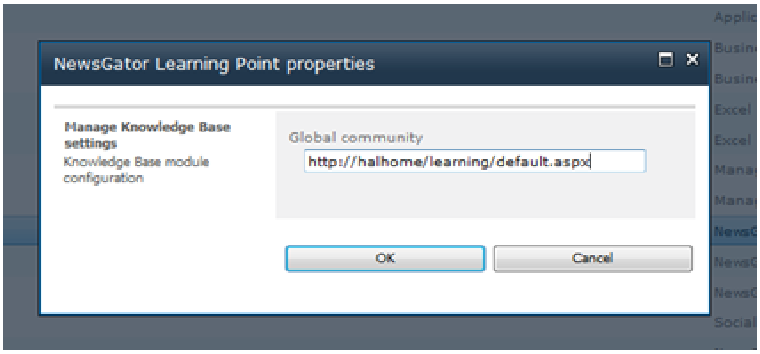
2. Activate the NewsGator Knowledge Base (Web) feature.

To specify which community or site contains the global knowledge base, do the following:

1. Go to **Central Administration** > **Application Management** > **Manage Service Applications**.

2. Select the **NewsGator Learning Point Service** and fill in the URL as seen in picture 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.




*Screenshot 754: Learning Point Properties*

#### 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 only shows 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 only lets 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 Aurea Social Service App. The Enrich service app should be consumed by child farms.

### 1.44.3 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.

## 1.45 Aurea Social Mobile module v3.5+

#### Overview

The Mobile module for Aurea Social consists of native client appsfor 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.

For further information, see Aurea Social v5.5Planning and Installation Guide.

### 1.45.1 Supported authentication methods

The Aurea Social mobile clients works with either Classic or Claims based authentication modes, when used with the following methods:

- Basic over SSL
- 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.

### 1.45.2 Supported Aurea Social server version

Aurea Social native apps for iOS and Android works with server versions 3.1 and above.

Windows Phone 8 works with server version 3.5 and above.

### 1.45.3 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.

> **Note:**
> Screenshots provided in all the topics under Aurea Social Mobile module v3.5+ are taken with Safari browser on iPhone.

### 1.45.4 Mobile Settings in Central Administration

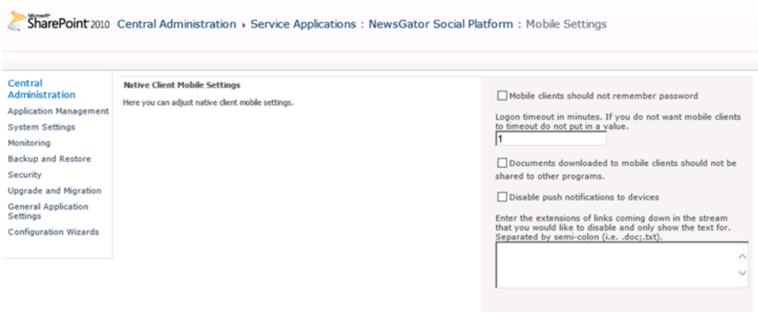
These settings can be found within SharePoint Central Administration.

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.

- Specify whether or not the mobile device should remember a user's password.
- Specify the length of time the app remembers a user's credentials and keeps them logged in.
- Specify if links within the Activity Stream should be disabled based on a file extension.
- Whether or not the mobile client should allow documents to be downloaded.
- Whether or not push notifications should be enabled.



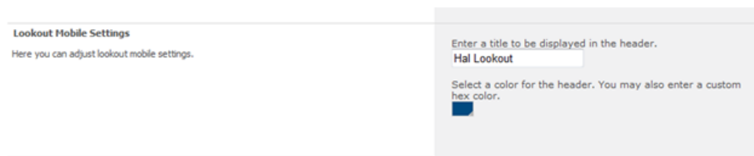

*Screenshot 755: Native client mobile settings*

### 1.45.5 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 / Aurea Social deployment.

For example, at Skyvera, the intranet is named "Hal", so here we use "Hal Lookout" as the title in the mobile browser.




*Screenshot 756: Lookout Mobile Settings*

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

## 1.45.6 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. Skyvera endpoints live within the subfolders of "ng" and "ngc", and SharePoint scripts live in the root levelof _vti_bin

The iOS/Android/Windows Phone 8 clients does 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 inform-
ation 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={fil-
terData}&pagingToken={pagingToken} - Gets the feed for the given community, url is
context sensitive.
/_vti_bin/ng/Client.svc/Context/{contextId}/?filter={filter}&filterData={fil-
terData}&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 sug-
gestions 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 ques-
tion.
/_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  defaults to true if not provided. This sets 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={fil-
terData}&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={fil-
terData}&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 returns 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={syn-
cDate}&setLV={setLV} - Gets the latest items in a feed for the logged in user using
the syncDate provided. A maximum of 100 new items is returned. If filter = Tile,
setLV defaults to true if not provided. This sets 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
are returned. If filter = Tile, setLV defaults to true if not provided. This sets 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={fil-
terData}&syncDate={syncDate} - Gets the latest items in a feed for the given com-
munity using the syncDate provided, url is context sensitive. A maximum of 100 new
items are returned.
/_vti_bin/ng/Client.svc /Sync/Community/m/?filter={filter}&filterData={fil-
terData}&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 are returned.
/_vti_bin/ng/Client.svc /Sync/Context/{contextId}/?filter={filter}&filterData={fil-
terData}&syncDate={syncDate} - Gets the latest items in a feed for the given context
using the syncDate provided. A maximum of 100 new items are returned.
/_vti_bin/ng/Client.svc /Sync/Context/m/{contextId}/?filter={filter}&filterData={fil-
terData}&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 are returned.
```

#### POST Methods

```
/_vti_bin/ng/Client.svc/Community/{identifier}/Ask/ - Submits a microblog to a com-
munities 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>

## 1.46 Mobile Device Management / Mobile App Management integrations

### Overview

Skyvera is currently evaluating MDM/MAM support. Please contact Skyvera to discuss your specific situation.

### 1.46.1 Browser support

Aurea 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:**
> 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) Aurea Social should work with Edge for all web parts.

### 1.46.2 Language support

Aurea Social can be localized to the following languages. Contact your support rep if you are interested in a localized version of Aurea 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).

### 1.46.3 How Aurea Social 2013 Communities differ from Aurea 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 Aurea 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
- Community sites

In their default, "out of box" deployment, these site types differ from one another in their social behaviors. When Aurea Social is installed, all of these site types automatically attain a consistent set of behaviors (without need for an administrator to manually activate them):

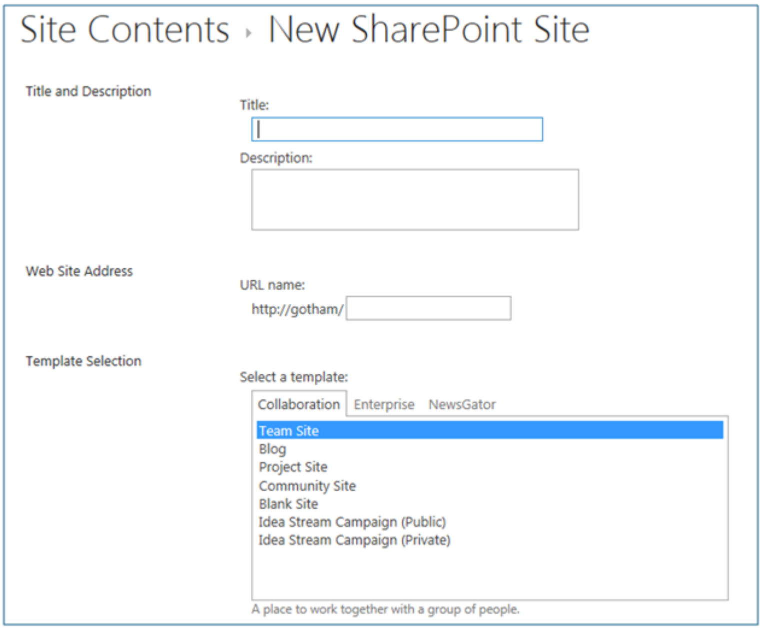
- They have a stream view on front page
- Users can target microblogs and questions to the streams of any number of these sites from anywhere (for example, I can ask a question from the My Site and send it to three of these sites)
- The creation of any item on any of the standard list or library types 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 (for example, any new document, wiki, discussion, blog, announcement, task, calendar, bookmark, or picture – creates 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.

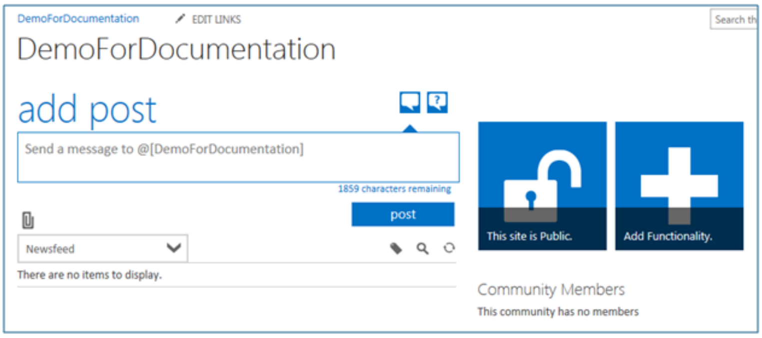
The Idea Campaign sites pictured here are included if you have the Idea Stream module.




*Screenshot 757: New Sharepoint Site*

**Creating a Team Site**

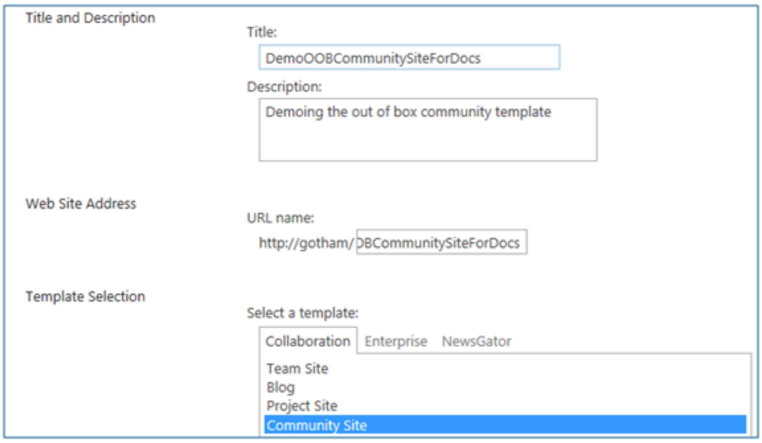
In the screenshot above, the template selection of "Team Site" allows creation of a team site. Creating a team site results in a site that looks something like this:




*Screenshot 758: DemoForDocumentation*

**Creating a SharePoint community site**

Creating a Aurea 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:




*Screenshot 759: Select a template*

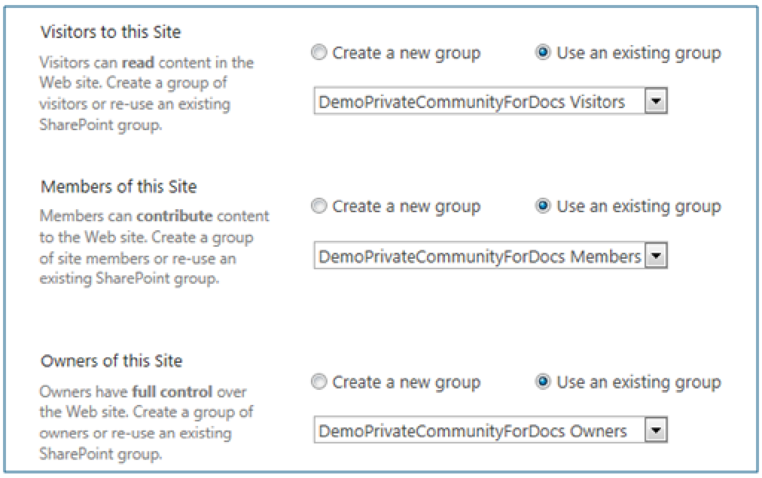
One important difference between creating a community site and creating a team site occurs if you choose to break inheritance and use specific permissions (when creating a private community for example).


*Screenshot 760: Select Permissions*

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.

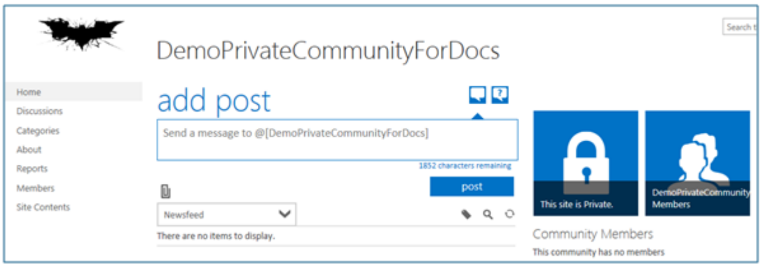
You may want to leave the default settings on this page unchanged (see example below) because SharePoint is going to apply these security groups automatically. If you change groups on this screen, you can end up with missing permissions.

You can go back and change groups later if you desire.




*Screenshot 761: Set up Groups*

In this example, :

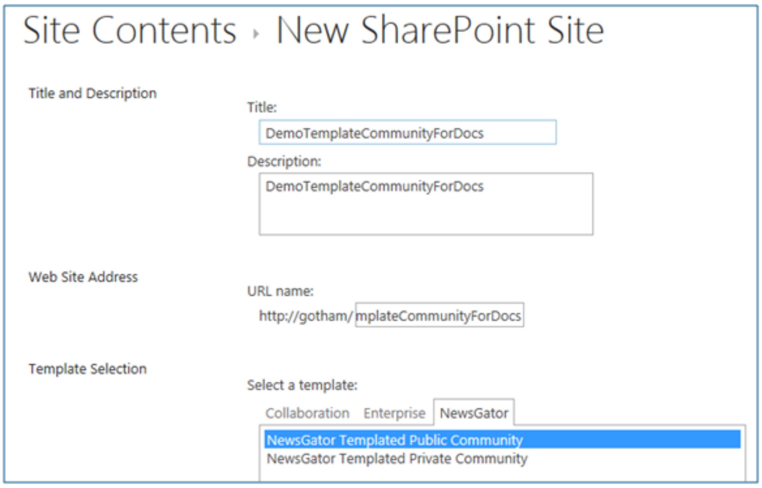



*Screenshot 762: A private community using the SharePoint community site creates a site like this*

The **Discussions** link goes to the SharePoint 2013 community discussion. The **Categories** link is for managing discussion categories.

#### Creating a NewsGator Community Site

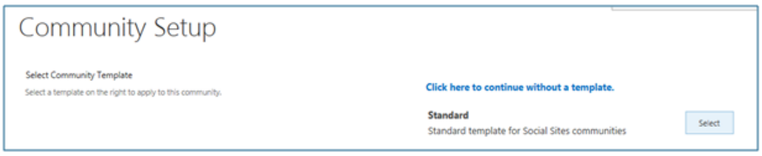
If you want to have some standard pre-defined types of communities (or you have been using the Aurea Social community "template" feature in SharePoint 2010), you can choose to select this option from the NewsGator tab when creating a new site:




*Screenshot 763: Creating a NewsGator Community Site*

Templates must be defined in Central Admin for this option to work.

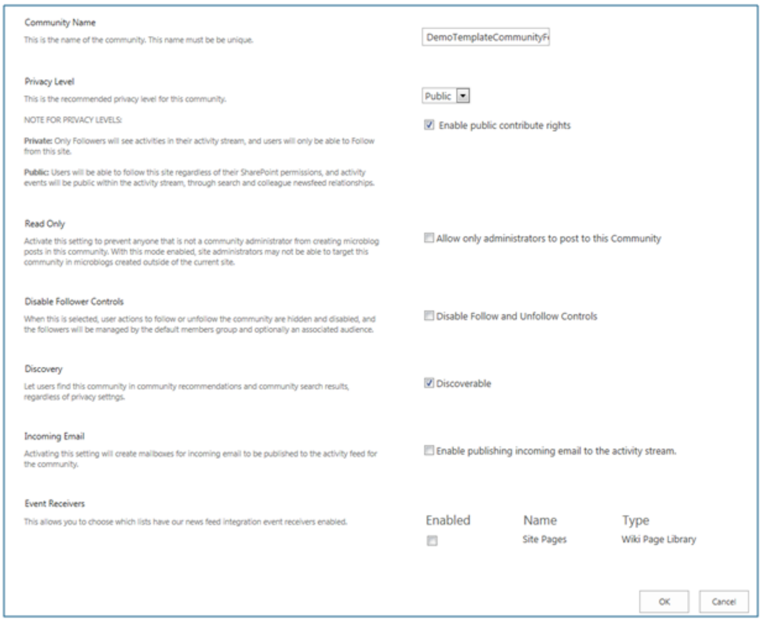
If you are familiar with how this capability worked in SharePoint 2010, you find the flow to be very similar. The site creator is presented with one or more template choices (in the case pictured here, only one has been defined).




*Screenshot 764: Community setup*

1. Click **Select**. Setup screen is displayed.

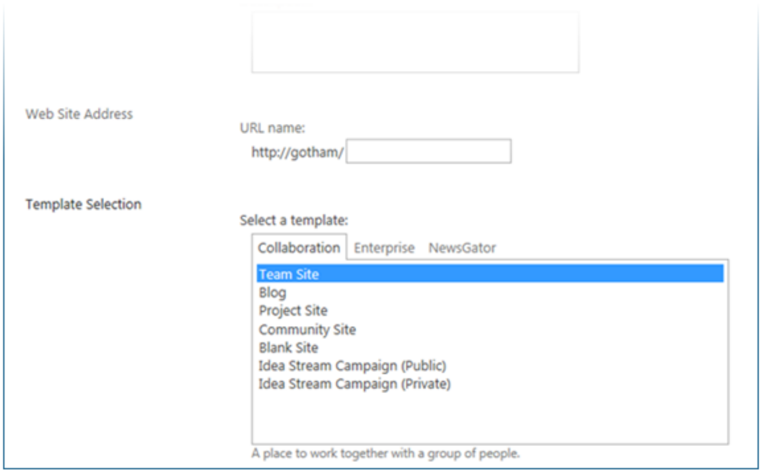
2. Click **OK** on this screen to completes the process.




*Screenshot 765: Click Ok*

**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. Aurea Social adds this to make it easier for administrators to create a site which has no social features.



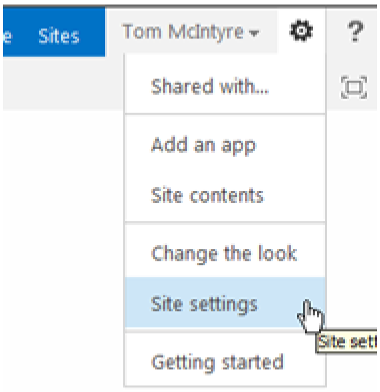

*Screenshot 766: Select template*

## Accessing administrative options

In Aurea 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.

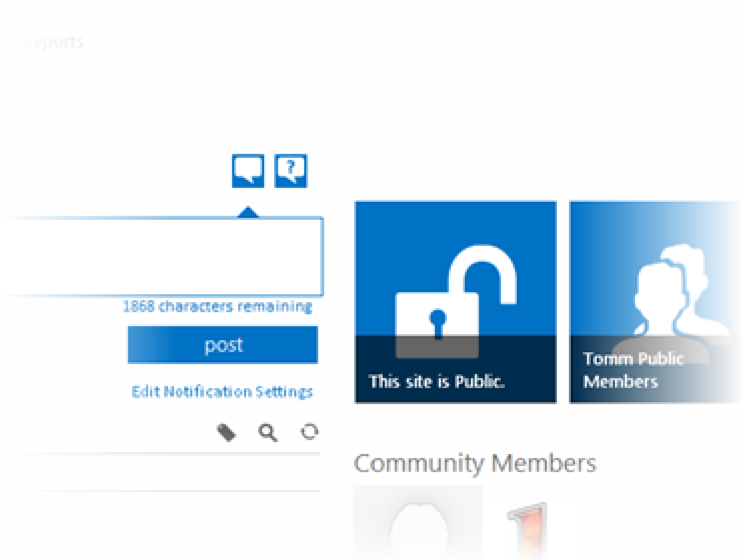



*Screenshot 767: Click Site Settings*

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 Aurea Social stream is enabled, and the security status is displayed to the right of this with the "padlock" tile:



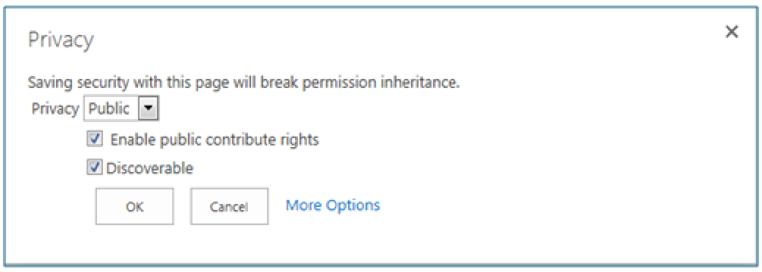

*Screenshot 768: Security status is displayed on the right with the padlock tile*

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.

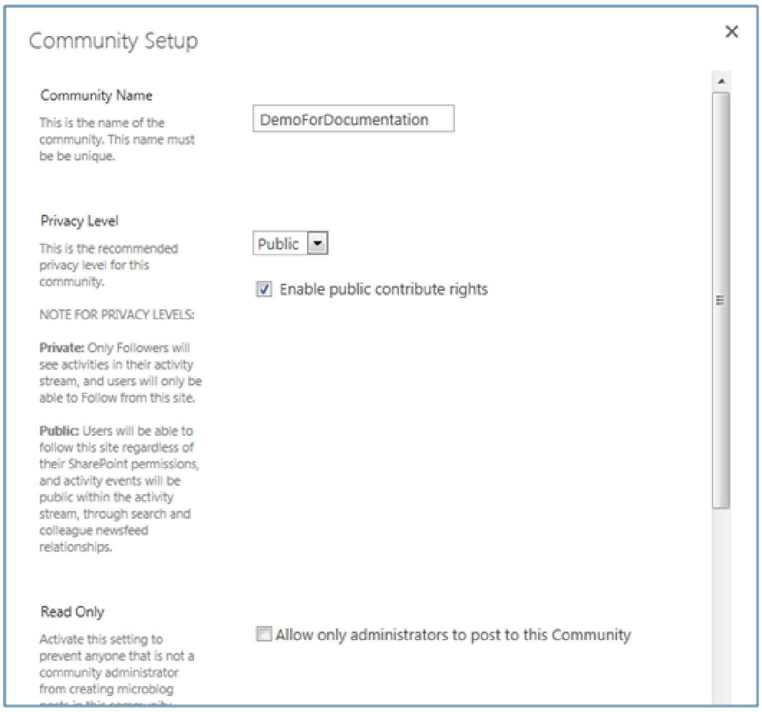
For further details see Accessing administrative options section.

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.




*Screenshot 769: Click More options*

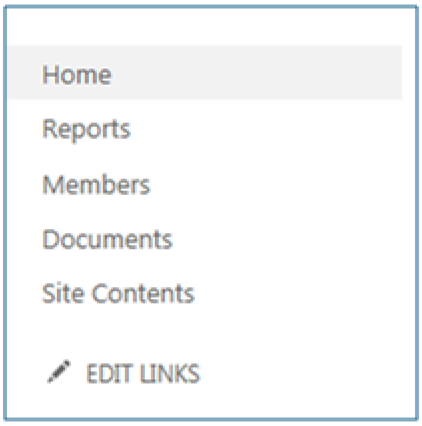
The full setup page is then accessible by clicking the **More Options** link:




*Screenshot 770: Full page setup*

## Navigation and Report access

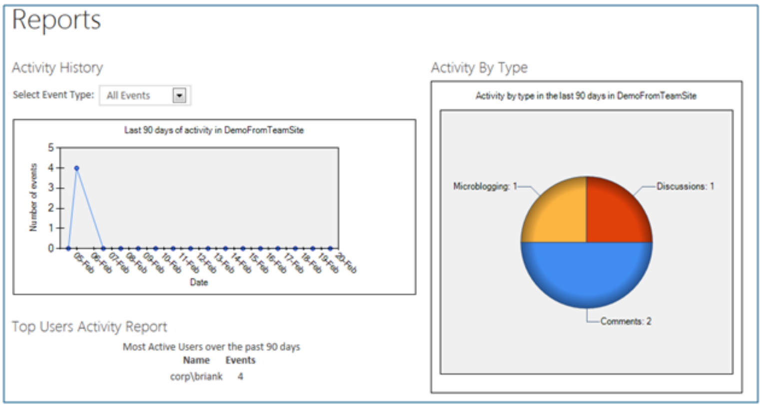
By default, several navigation links are added to the Quick Nav on the left.




*Screenshot 771: Quick Nav*

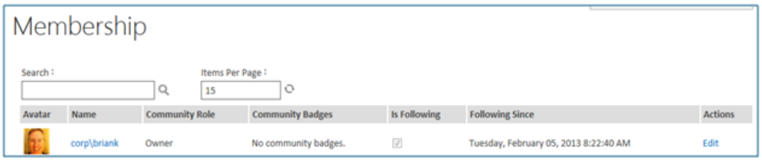
Reports gives access to the Aurea Social activity reports. In 2010, these are only shown automatically to site owners, as they are deployed to the Admin tab by default. Site owners can change permissions or remove the link to restrict access.

> **Note:**
> 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.




*Screenshot 772: Reports*

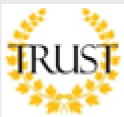
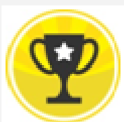
The Members link gives access to the Aurea Social community members page.

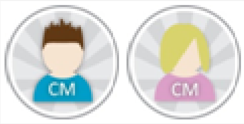
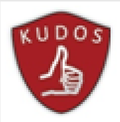



*Screenshot 773: Members page*

## 1.46.4 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 |
|  | 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 |
|  | kudos - recognition for a job well done |

## 1.46.5 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. |

## 1.46.6 Video Stream - SharePoint configuration

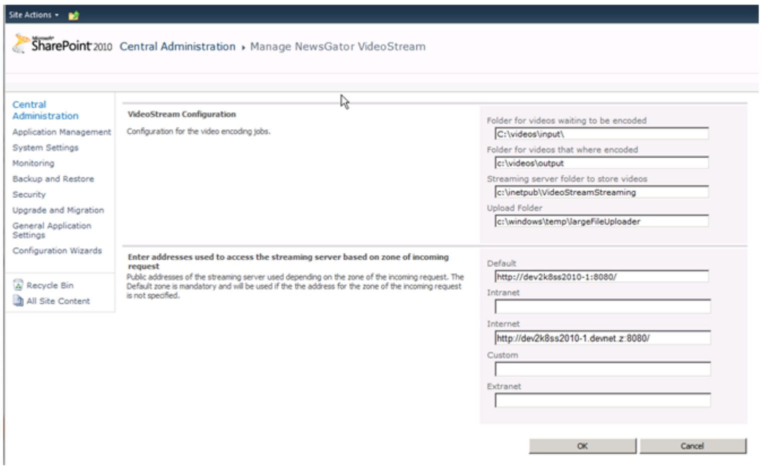
Video Stream's configuration options in SharePoint can be accessed from:

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.

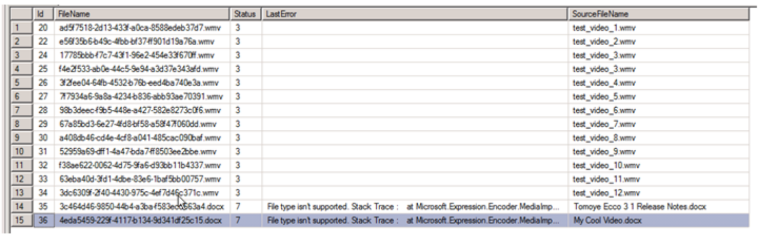



*Screenshot 774: Click Manage*

## 1.46.7 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**



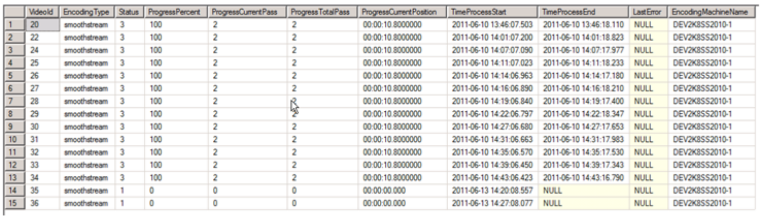
| | Id | FileName | Status | LastError | SourceFileName |
|---|---|---|---|---|---|
| 1 | 20 | ad5f7518-2d13-433f-a0ca-8588edeb37d7.wmv | 3 | | test_video_1.wmv |
| 2 | 22 | e56f35b6-b49c-4fbb-bf374ff901d19a76a.wmv | 3 | | test_video_2.wmv |
| 3 | 24 | 17785bbb-f7c7-43f1-96e2-454e33f670ff.wmv | 3 | | 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-f583e[illegible]63a4.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 |

*Screenshot 775: This table has an entry for every video in the entire farm*

| | |
|---|---|
| FileName | The filename of the video in the Encoding input directory. |
| Status | The status of this video. The possible values are:<br>» 0 – Video is waiting to be encoded<br>» 1 – Video is being encoded<br>» 3 – Video is available<br>» 4 – Error during encoding (waiting to notify user)<br>» 6 – Video marked for deletion<br>» 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 |

*Screenshot 776: Video Encoding Table*

| | |
|---|---|
| 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:<br>» 0 – Video is waiting to be encoded<br>» 1 – Video is being encoded<br>» 3 – Encoding is done. Waiting to notify SharePoint<br>» 4 – Error during encoding (waiting to notify user)<br>» 5 – Encoding cancelled<br>» 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. |

## 1.46.8 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**

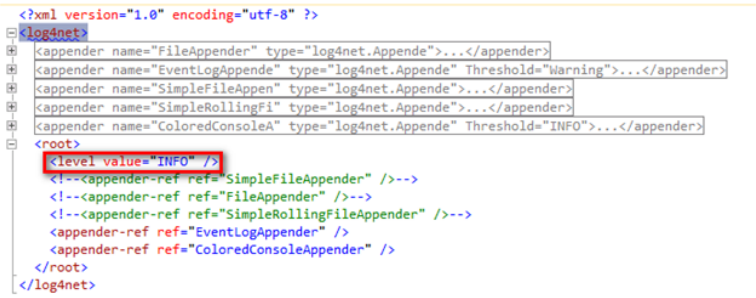
By default the Encoding Service only logs Warnings and Errors. To turn on verbose logging, do the following:

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 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>
```

*Screenshot 777: Find the node*

4. Change the value attribute from “WARN” to “INFO”. All the options are:

- ERROR : shows only errors
- WARN : shows warning and errors
- INFO : shows informational messages, warning and errors
- 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.

## 1.46.9 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

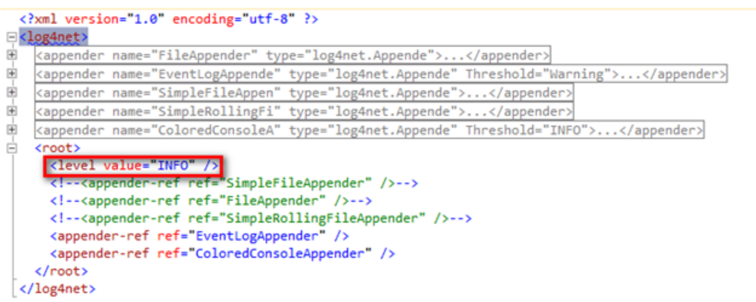
By default the Streaming Server only logs Warnings and Errors. To turn on verbose logging, do the following:

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 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>
```

*Screenshot 778: Find the node*

4. Change the value attribute from “WARN” to “INFO”. All the options are:

- ERROR : shows only errors
- WARN : shows warning and errors

- INFO : shows informational messages, warning and errors
- 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 uses:

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 :

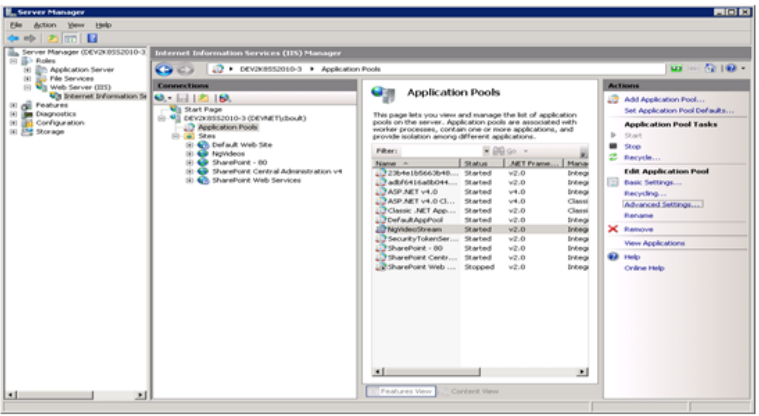
```
<connectionStrings>
<add name="NewsGator.VideoStream.IsmHttpModule.Properties.Settings.DBConnectionString"
  connectionString="Data Source=(local);Initial Catalog=NewsGator_Videos;Integrated Security=True" />
</connectionStrings>
```

*Screenshot 779: Find the node*

4. Ensure it is pointing to the right database.

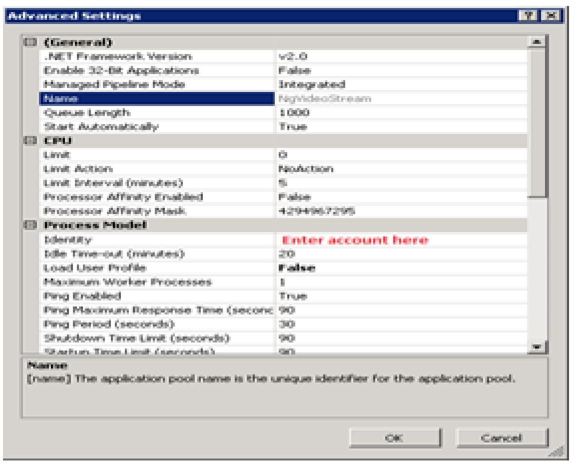
If the connection string is set to use integrated security, as in the example above, you will also need to ensure the app pool account has read / write access to the database:

1. Open the **Server Manager** and navigate to the **Streaming Server's App** pool.




*Screenshot 780: Streaming Server's App pool*

2. Select **Advanced Settings** and ensure the identity of the app pool has access to the database.




*Screenshot 781: Advance Setting*

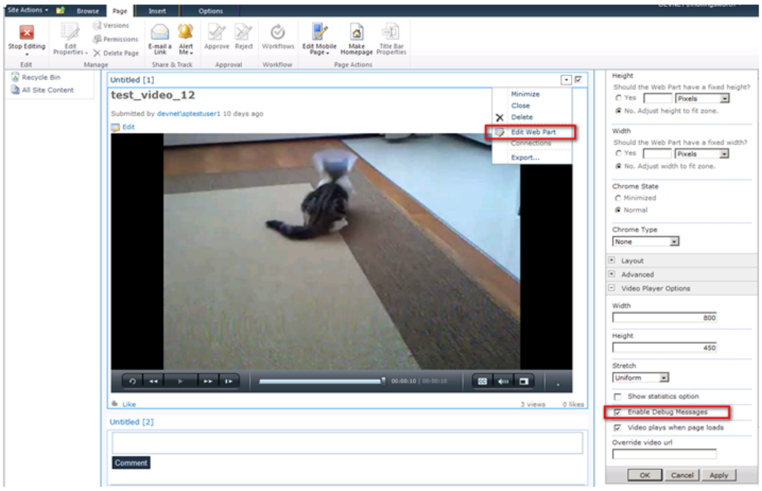
## 1.46.10 Video Stream - Video Player

**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.

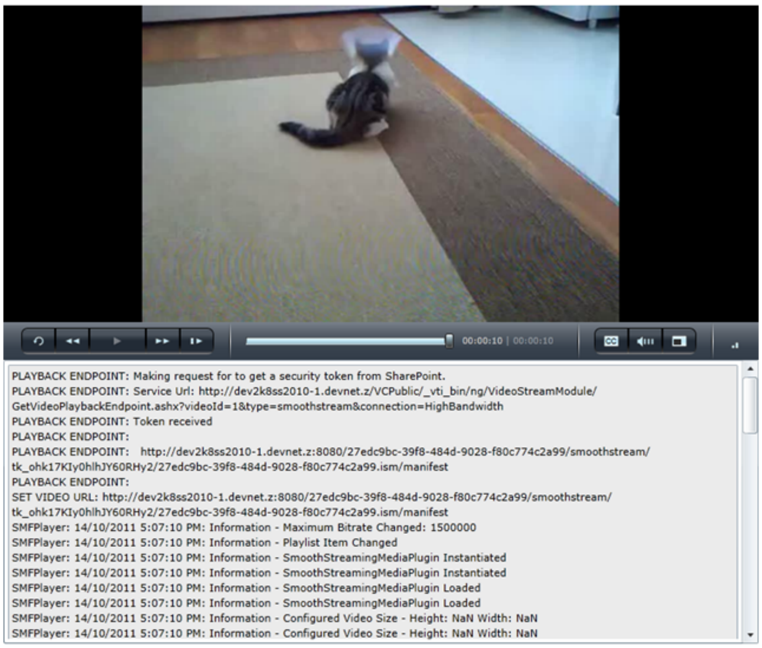
Enabling Debug Mode by:

1. Visit the full video page for any video
2. Go to **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**.




*Screenshot 782: Click on Edit Web Part*

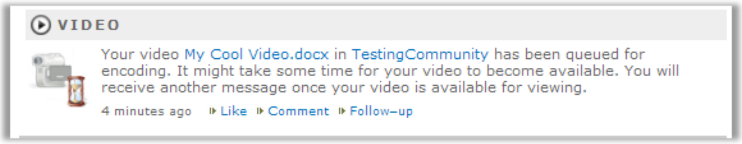
You now see a debug Window under the Video Player.



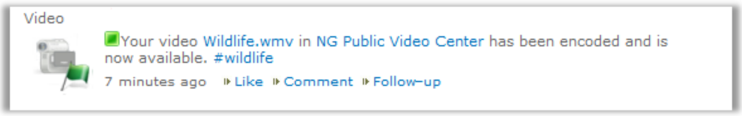

*Screenshot 783: Debug Window under the Video Player*

## 1.46.11 Video Stream -Activity Stream Messages

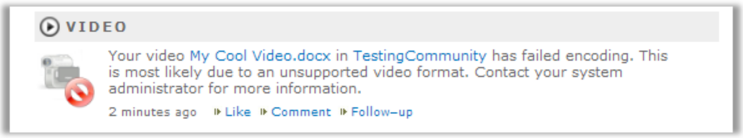
There are several types of messages sent to a user's activity stream:



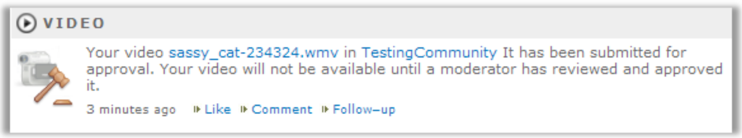

*Screenshot 784: When a user uploads a video and it is queued for encoding, they see this message in their activity stream.*




*Screenshot 785: When a user's video has been encoded and it now available in the video center and/or community they see this message in their activity feed*




*Screenshot 786: When an error occurs during the encoding process, the user sees this message in their activity feed*

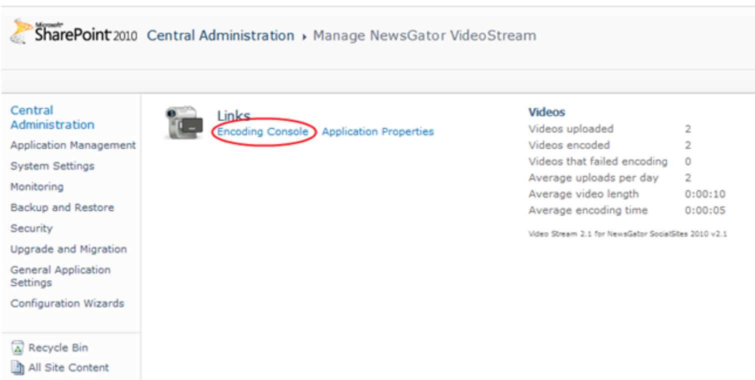



*Screenshot 787: When a community is moderated a user sees this message in their activity feed when their video is awaiting approval.*

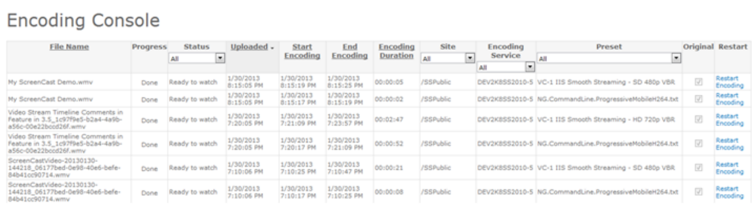
## 1.46.12 Video Stream - Encoding Console

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.

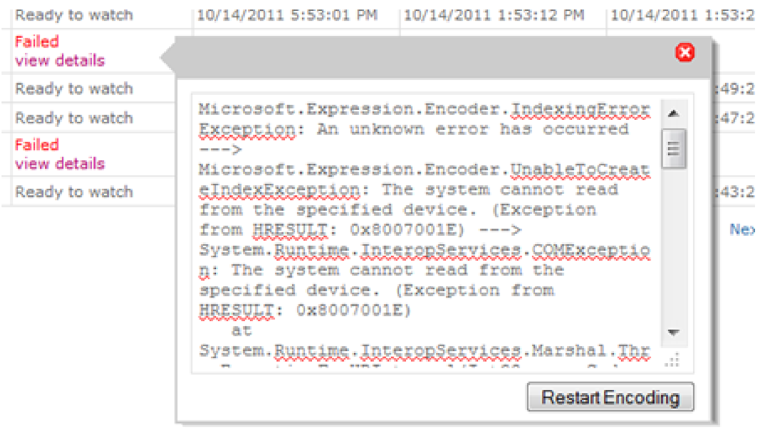



*Screenshot 788: Encoding Console*




*Screenshot 789: An example of what the console looks like*

If you click on the **view details** link, a window with a detailed error message appears:




*Screenshot 790: Detailed error message*

If the error has been addressed, clicking **Restart Encoding** reschedules the video for encoding and it will be handled by the encoding service the next time it runs.

## 1.46.13 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.

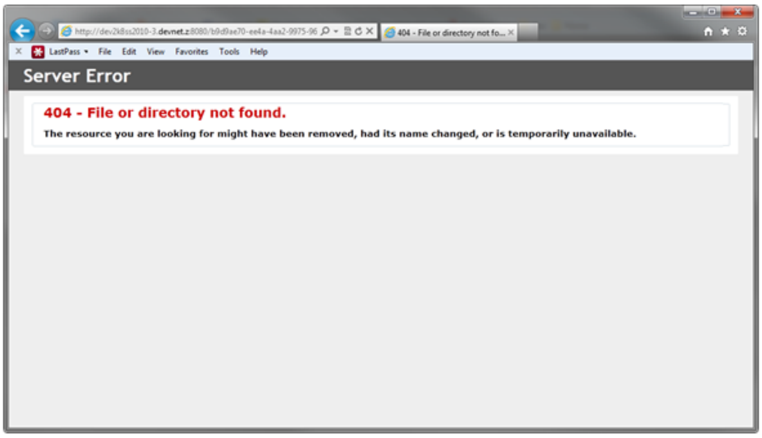
13. Use FireFox Firebug or IE 9 to see the actual http error.

14. To exclude a firewall problem make sure the requests to the `*.ism/manifest` file are in the IIS logs.

## 1.46.14 Video Stream - getting more information from IIS

Opening a URL to IIS from a remote web browser only contains minimal information.

Here is an example of a remote error response from IIS.

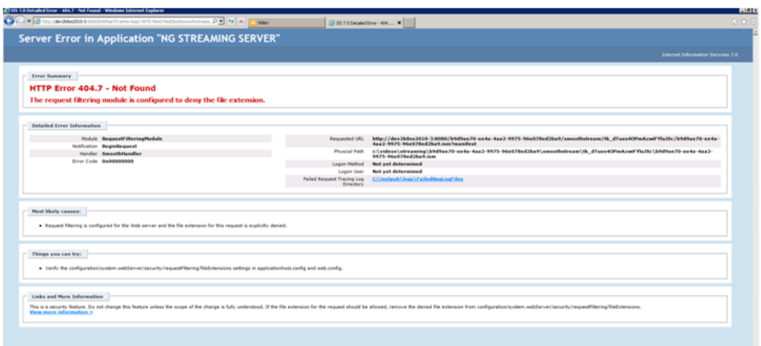



*Screenshot 791: Remote error response from IIS*

Using this page alone, it's hard to figure out why the server is returning this response.

You 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.




*Screenshot 792: **Most likely causes** section tells you exactly why the request is most likely returning this response*

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 tells you exactly why the request is most likely returning this response.

## 1.46.15 Aurea 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 is 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

Below are the steps to enable and disable the Kontiki Integration feature.

### Prerequisites

The Kontiki Integration feature requires Aurea Social5.1 and Aurea 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 Aurea Social installer or the Video Stream Additional Components installer can be ignored. IIS and the Smooth Streaming Extensions for IIS is not required.

The Kontiki Integration feature requires the Kontiki client to be installed on any machine that views videos. If the Kontiki client is not installed on the user's machines they cannot 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 needs 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 loads 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

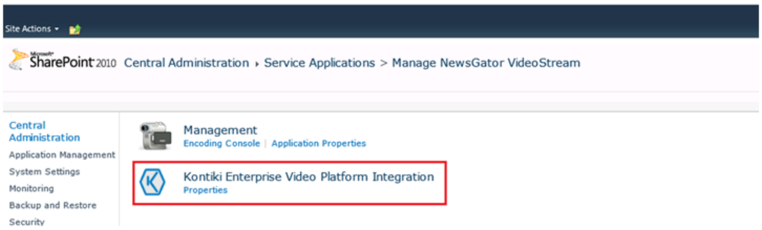
Once deployed, a new Farm level feature is available. This feature is called **NewsGator VideoStream Integration With Kontiki** (Farm). Activating this feature registers Kontiki as a possible provider for video encoding and streaming.

> **Important:**
> After enabling the feature you should restart IIS and the SharePoint Timer service on all the servers in the farm.

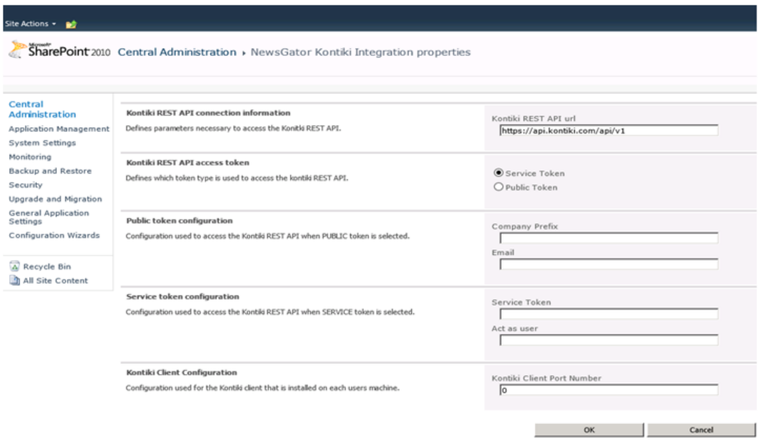
## Step 4 - Configuring Kontiki integration

Once the solution file is deployed and the farm level feature is activated a new Kontiki option appears on the manage page for the VideoStream module.

This option takes you to a Kontiki properties page where you can configure the connection with the Kontiki Publishing web service.




*Screenshot 793: Kontiki option appears on the manage page*




*Screenshot 794: Kontiki properties*

### Fields on the properties page:

- **Kontiki REST API url:** The url used to access Kontiki's REST endpoint. It is https://api.kontiki.com/api/v1.

» **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. For further details, see **Kontiki's REST API documentation** for an explanation of service and public tokens.

» **Public token configuration:** If you have selected **Public Token**, you have to fill in this section.

- Company Prefix (mandatory): The company prefix Kontiki provided you with.
- Email (mandatory): Any company email address.

» **Service token configuration:** If you selected Service Token, you need to fill in the values in this section.

» **Service Token (mandatory):** The service token Kontiki provided you with. This token gives you rights to do any action using the REST API endpoint.

» **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.

» **Kontiki Client Port Number:** The port number the Kontiki clients are configured to listenon in your environment.

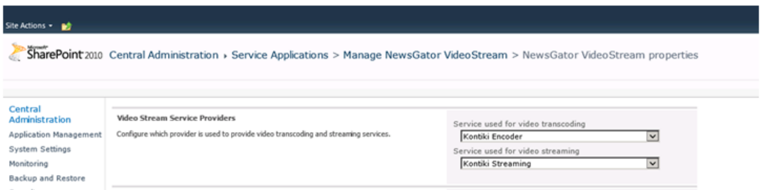
## Step 5 – Enabling Kontiki as an encoding and streaming provider

Once you have configured access to the Kontiki REST API endpoint you need to tell **VideoStream** to use Kontiki to encode and stream videos.

To do this, follow the below steps:

1. Go to the **VideoStream configuration** page.

2. Change both fields in the **Video Stream Service Providers** section to be **Kontiki Encoder** and **Kontiki Streaming**.




*Screenshot 795: Video Stream Service Providers*

> **Note:**
> Once changed you can only encode to Progressive download. If you attempt to enable other encoding formats (supported by Video Stream native encoding) the configuration page does not allow you.


*Screenshot 796: Any attempt to enable other encoding formats is not allowed*

## Switching back to Video Stream native mode from Kontiki Integration mode

To switch back to Video Stream native mode, follow the below steps:

1. Select **NewsGator Video Stream Encoder** and **NewsGator Video Stream Streaming** in the configuration page.

2. Go to **Central Administration > Manage Farm Features** and deactivate the **NewsGator VideoStream Integration With Kontiki (Farm)**.

3. Install the streaming server.

Consult the Aurea Social v5.5 Installation guide for details.

## 1.46.16 Aurea 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 can play inline in the activity stream. If you configure your write key, then a video upload icon shows up in the activity stream allowing you to upload a video to **BrightCove**.

Behaviors you can configure on that page:

» **Read token:** The read token associated with your account that gives you read access to your videos through the BrightCove REST API.

» **Write token:** The write token associated with your account that gives you the possibility to upload new videos to your BrightCove Video Cloud.

» **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.

» **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:

- `{playerId}` : The ID of the video player that is used.
- `{videoId}` : The ID of the video that is played.

» Time a video is allowed to get uploaded: This is the time in minutes the system allows for a video to get uploaded. If it takes longer that this time the upload is canceled.

» Text to be associated with activity stream entry: This the template of the text that is created as an activity stream entry once a video is uploaded to **BrightCove Video Cloud**. You have access to the following replacement values:

- `{postText}`: Text the user adding the video can enter.
- `{videoTitle}`: The title given to the video.
- `{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.

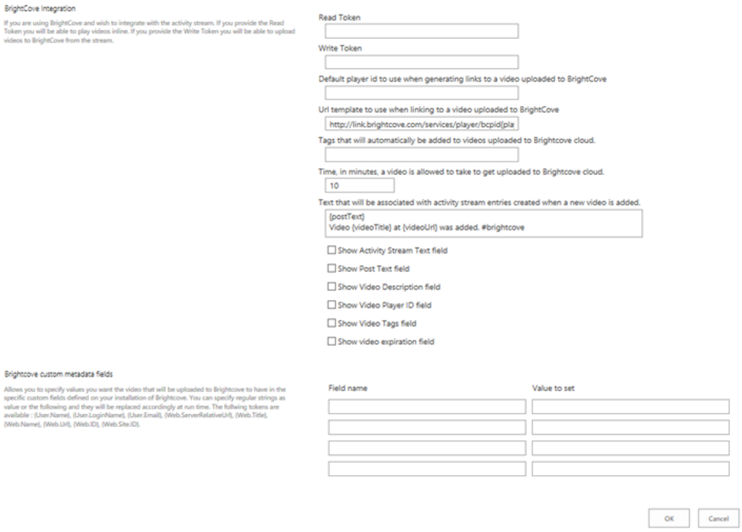
» 7. Which non mandatory fields are made available on the video upload page.

- **Shows Activity Stream text field:** The complete activity stream text that is 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.
- **Show Post Text field:** Allows the user to input some text that is put in the activity stream text where the admin has specified the {postText} replacement value.
- **Show Video Description field:** The video description is not mandatory, you can choose to allow users to enter a description or not.
- **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.
- **Show Video Tags field:** Allows the user to specify tags to add to the video. The tags are added both to BrightCove and Aurea Social.
- **Show video expiration field:** Allows the user to specify a video expiration date.

» 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 cannot 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 is converted run time.

The set of replacement values are:

- `{User.Name}` : Full name of the user adding the video
- `{User.LoginName}` : Aurea Social login name of the user adding the video
- `{User.Email}` : Email of the user adding the video
- `{Web.ServerRelativeUrl}` : Server relative url of the SharePoint web where the video was added from
- `{Web.Title}` : Title of the SharePoint web where the video was added from
- `{Web.Name}` : Name of the SharePoint web where the video was added from
- `{Web.Url}` : Full url of the SharePoiint web where the video was added from
- `{Web.ID}` : Id of the SharePoint web where the video was added from
- `{Web.Site.ID}`: id of the SharePoint site where the video was added from




*Screenshot 797: BrightCove Video Cloud integration*

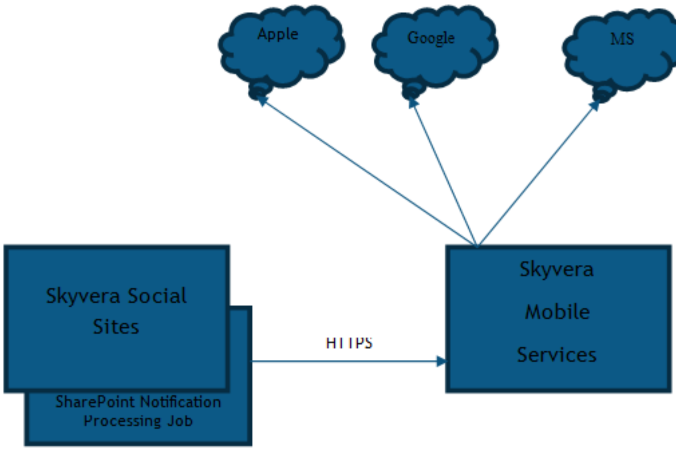
## 1.46.17 High level design for Push Notifications with Aurea Social Sites

Aurea 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 Aurea Social mobile application, it is processed at this time.

Aurea 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, Skyvera can manage that for all of its customers.




*Screenshot 798: Cloud Service running in the Microsoft Azure Cloud*

**Processing steps:**

» Aurea Social Sites processes notifications in a custom Skyvera 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 enables or disables 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 Skyvera service and is specific to the phone's platform. Once the device is registered, it forwards the **Device Token** (provided by the call to the device specific platform vender) to Social Sites. We 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 Skyvera Mobile Services 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 log that information so that we can troubleshoot.

Both Google and Apple also reports back to us any **Device Token** that is no longer valid, for whatever reason. We 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.

## 1.46.18 Aurea 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 can play inline in the activity stream.

A video upload icon shows 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

**Url to the Kaltura platform API**

Should typically be: `http://www.kaltura.com`

> **Note:**
> To use the Kaltura API, you need a Publisher Account with API access.

**Your partner ID that identifies you to the Kaltura platform**

To find your Kaltura partner id:

1. Open the KMC and go to **Settings > Accounts Settings**

2. Under Account Info, copy the Partner ID value

**The ADMIN secret to use an ADMIN connection to the Kaltura platform.**

You can get that key from :

1. Open the KMC and go to **Settings > Integration Settings**.

2. The **Administrator Secret** field is the value.

> **Note:**
> The key is never sent to the client. It is only used server side while communicating with Kaltura.

**The USER secret to use a USER connection to the Kaltura platform.**

You can get that key from:

1. Open the KMC and go to **Settings > Integration Settings**.

2. The **User Secret** field is the value.

> **Note:**
> If you use a user session instead of an admin session you have to ensure the user account used has all the appropriate access to add and view videos.

**User login id to use when using the USER secret or login/password connection type.**

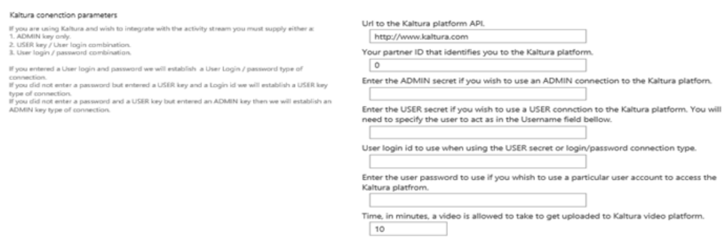
This is only needed if you are using a USER secret instead of an ADMIN secret.

**Password to use if you wish to use a USER secret connection type.**

This is only needed if you are using a USER secret instead of an ADMIN secret.

Time, in minutes, a video is allowed to take to get uploaded to Kaltura video platform

If the upload takes more than the set amount of minutes, it is stopped.




*Screenshot 799: Kaltura connection parameters*

## Kaltura integration parameters

- Url template to use when generating the link that is displayed to users in the system

- This is the link that users get if they directly click on the video link in the stream
- By default we create the link to media space. If you want the link to go to media space you have to change it by replacing `<yourhost>` with the value appropriate for your company.

» Url template to use when rendering the Kaltura player in the stream

- This is the link to the actual video file.

» Default player id to use when generating links to a video uploaded to Kaltura video platform

- This is the player id that is placed in the link created when the video is added to the stream.

» Always use the default player for Kaltura videos in the stream

- This causes the playback to always use the default player you specified and ignore any player id in the link.

» Tags that is automatically added to videos uploaded to Kaltura video platform

- The video module can add tags to the video added to Kaltura. Tags specified in this field is always added to the video.
- Separate tags with a space.

» Text that is associated with activity stream entries created when a new video is added

- This is the actual stream entry text that is created when the video is added.
- The text can contain place holders that are replaced by their appropriate value at run time
  - {postText} – Text specified as post text in the create video dialog
  - {videoTitle} – Title specified in the create video dialog
  - {videoUrl} – The url to the video, this is the url specified in section 1). This place holder must be somewhere in the text.

» Show Activity Stream Text field

- Determines if the activity stream text field is showed in the create video dialog.
- The data in this field is the complete text that is set for the activity stream.
- By default, the data in this field shows what you entered as the default text associated with the activity stream.

> **Note:**
> If it does not showed the activity stream text is the default text.

» Show Post Text field

- Determines if the post text field is showed in the create video dialog.
- The data in this field is placed in the stream text and replace the place holder `{postText}`

> **Note:**
> If you do not include `{postText}` in the activity stream text this field does not show anywhere.

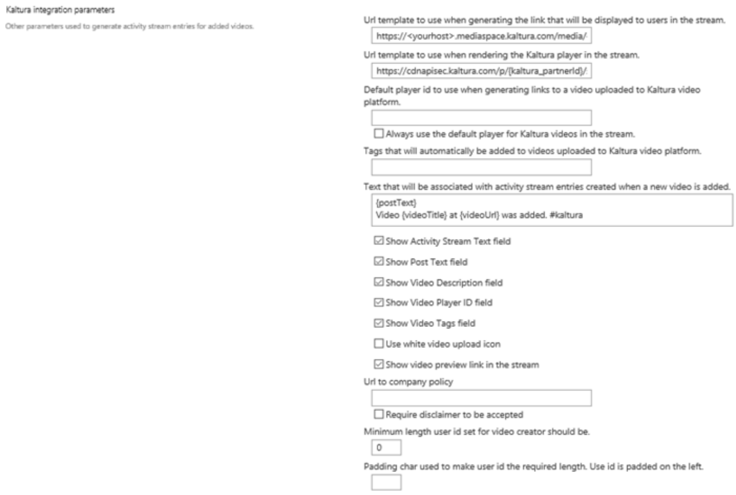
» Show Video Description Field

- Determines if the video description field is showed in the create video dialog.
- This field sends the video description to Kaltura.

- Show Video Player ID field
  - Determines if the Player Id field is showed in the create video dialog.
  - This field allows the user to specify which player id to use when creating the link to the video.
  - If this field is not showed the default player id is used
- Show Video Tags field
  - Determines if the tags field is showed.
  - The tags a user enters in this field are in addition to those you might have configured in the **Tags**, they are automatically added to videos uploaded to Kaltura video platform" field
- Use White video upload icon
  - If selected, a white video upload icon is used instead of a gray one. This can be used if you have a theme where the gray icon does hot have enough contrast.
- Show video preview link in the stream
  - Determines if the link to the video is hidden in the stream or not.

> **Note:**
> The link still shows up in digest emails.

- Url to company policy
  - When entered there is a link to the policy showed to the user in the create video dialog.
- Require disclaimer to be accepted
  - When selected this forces the user to select the check box that says you have read and agree with company policies before being able to submit the video.
- Minimum length user id set for video creator should be
  - We 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.
  - The field allows you to set a size for the id that we send. By default, the ID is padded with spaces before the id.
  -
- Padding char used to make user id the required length. User id is padded on the left.
  - This allows you to change the padding character used.




*Screenshot 800: Kaltura integration parameters*

## Video Expiration Settings

» Show video expiration field

- Determines if the video expiration field is showed in the create video dialog.

» Metadata profile id used to store the video expiration date

- If you leave it at -1 we use the default Kaltura expiration mechanism
- If you enter an id then it retrieves that metadata profile to find the field into which the expiration date is stored

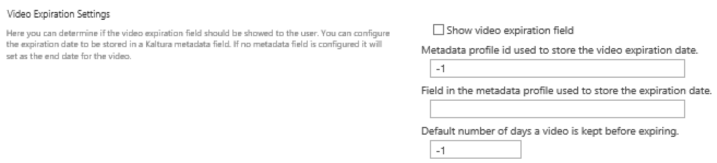
» Field in the metada profile used to store the expiration date

- The field from the metadata profile we retrieve where we store the expiration date.

» Default number of days a video is kept before expiring

- If entered it sets the expiration by default to today + number of days specified.
- The expiration date can be changed by the user if the expiration date field is showed. Otherwise it cannot be changed and the expiration is automatically set.

> **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.




*Screenshot 801: Video Expiration Settings*

# Using Aurea Social

Aurea Social is the most integrated, business-centric social business platform for organizations of all sizes and in every industry. Aurea Social allows you to choose your work environment with a flexible platform. You can connect via email or through microblogs.

This guide tells you how to set up your profile so your peers know who you are and what your area of expertise is.

This guide also teaches you how to use Aurea Social through a browser and mobile apps. Aurea Social also helps you organize streams from Yammer, Salesforce Chatter, LinkedIn and Twitter. You configure your social dashboard for the way you work.

Modules add functionality to the Aurea 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, desktops, mobile devices, and in Aurea Social communities.

» **Idea Stream:** Idea Stream empowers employees to propose new ideas to the organization, either informally or as full-blown campaigns. (Note: Innovation is a solution that expands Idea Stream.)

» **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.

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

» **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.

## 1.47 Web Parts

### Overview

A web part enables end users to modify the content, appearance, and behavior of web pages directly from a browser.

This section provides a series of easy steps to help users set up their profiles, connect to others, and learn how to use the activity feed.

Below is a succinct overview of the functions for users and communities provided by the web parts in Aurea Social. It's a good place to start to familiarize yourself with all the things you can do with Aurea Social.

### 1.47.1 User-based web parts

Below are the user-based web parts:

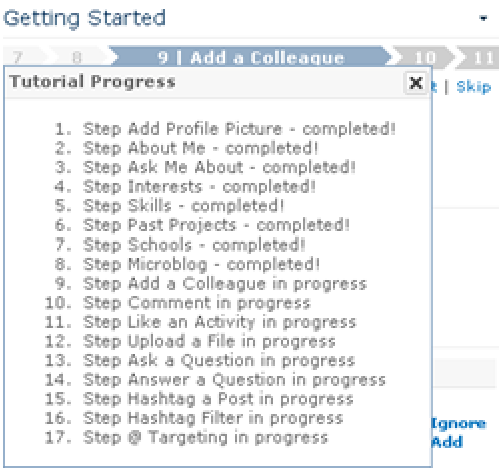
#### Getting started

#### Why is it useful?

Users can complete steps sequentially, skip steps, go back to repeat prior steps, or restart the process from the beginning. This web part includes 17 steps starting with the ability to upload, crop, and post a profile picture.

After steps 1-7 are completed, the Getting Started web part presents a tutorial on how to use other Aurea Social features such as microblogging, adding a colleague, uploading a file, and asking a question.

For example, see screenshots below:

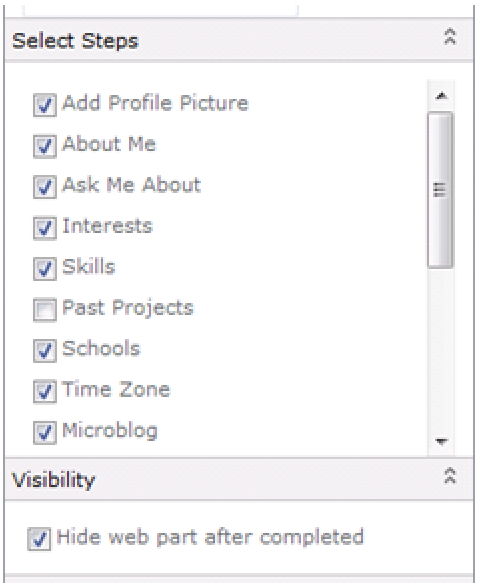




## Visibility settings

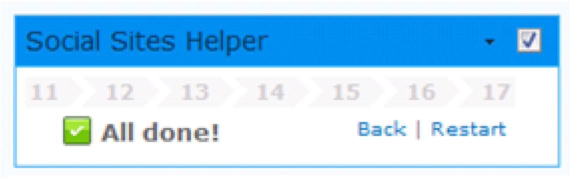
Two settings were added in v2.1 affecting the display of the Getting Started web part.

The **Select Steps** settings lets you choose to skip particular steps by unchecking them.

The **Visibility** setting causes the web part to disappear for any user who has completed the last step (versus displaying the **All done!** message).




*Screenshot 802: Select Steps*




*Screenshot 803: All done message*

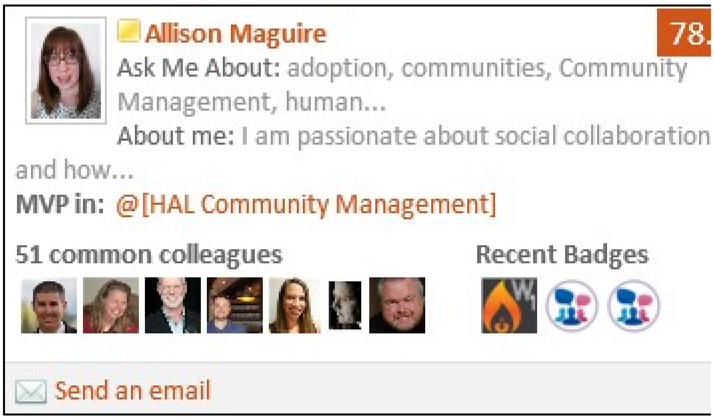
## Mini-profile cards

If this web part is enabled in Central Admin, mini- profile cards is displayed wherever a user's name is displayed.

The mini-profile card shows the person's name and work phone along with the **Ask Me About** and the **About Me** fields (if populated). The count and thumbnails of colleagues in common are displayed and the link to add this person as a colleague will display (if applicable). The **Send an email** link makes it easy to contact the person.

When the Internal Communications solution is installed, the mini-profile card can also show an "influence score" in the upper right corner which gives a sense of how much other users react to this user's posts in the activity stream.

Below are the examples of mini-profile card:


*Screenshot 804: 78 is the influence score*

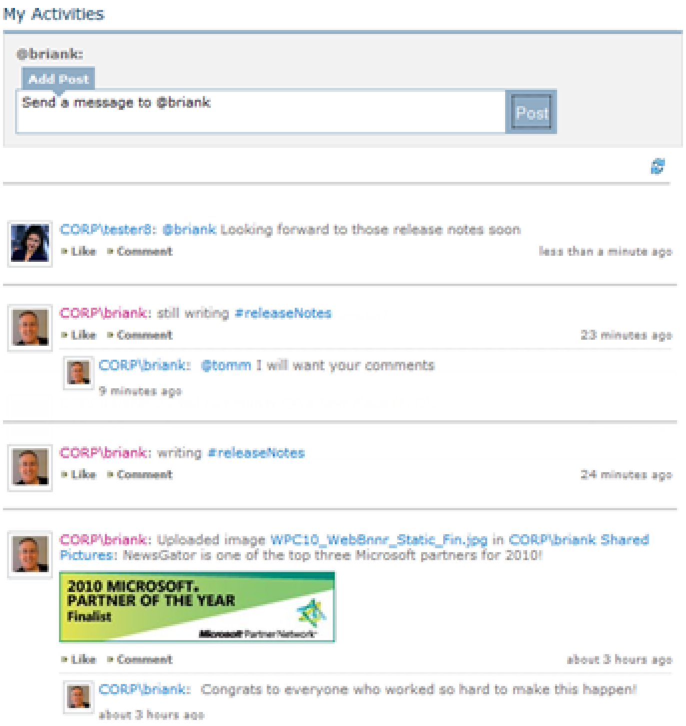
## My Activities

**My Activities** shows visitors your public events and microblogging activities, and allows them to message you directly.

This part functions quite similarly to the **Activity Stream** web part used on the My Newsfeed page. For further details, see the NewsGator Activity Feed.

Updates entered into the **Add Post** box are automatically targeted at the profile owner and subsequent notifications are sent via email or within the Aurea Social application (web, desktop, or mobile clients).

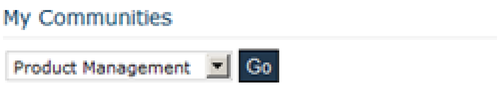
The list of events displayed consists of the profile owner's public actions, public items targeted at the profile owner, and any reactions of users to any of those events. Microblogging activity displayed does not include items that the profile owner has only "liked".




*Screenshot 805: My Activities web part*

## My Communities

My Communities shows a list of communities the user has chosen to follow, allowing easy navigation.




*Screenshot 806: Click dropdown to view the list*

## NewsGator Activity Feed

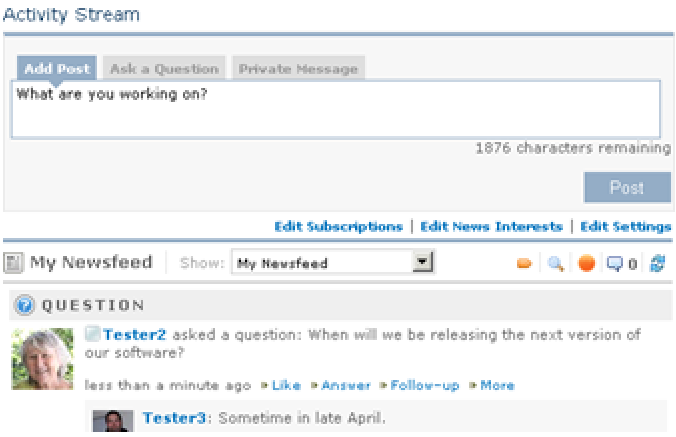
The NewsGator Activity Feed web part allows you to interact with your colleagues and communities, as well as view content related to your interests – all with integrated microblogging, Q&A, commenting, and a filtered activity feed.

This web part is the centerpiece of your **My Newsfeed** page. It replaces and extends SharePoint's **What's New** web part.

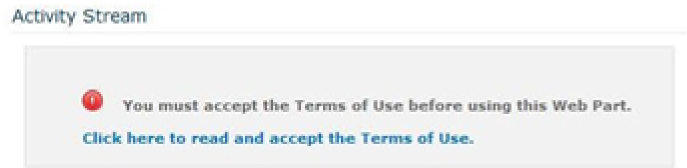
## Terms of use

If your organization uses the **Terms of Use** feature, users must accept a set of "social" terms before they can view or use the Activity Stream.

For further details on configuring this, see Terms of Use Configuration page.




*Screenshot 807: Activity stream*



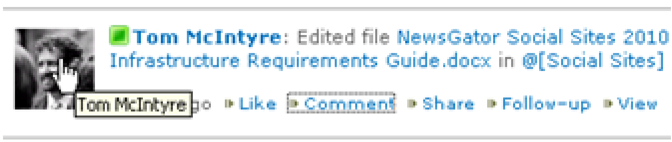

*Screenshot 808: Terms and conditions*

## Accessibility

The Activity Stream web part supports keyboard access to all controls (tabs, buttons, input boxes, etc.) and links.

Use the TAB key to move forward through clickable controls, SHIFT + TAB to move backwards, arrow keys to move within a textbox or list (and for page scrolling at other times), and ENTER to "click". A dotted outline indicates which control or link is selected.

Also, all images and forms have Alt tags.




*Screenshot 809: Hover mouse over image to see the tag*

## Post types

## Microblogging

Use the Add Post tab to add short messages, known as "microblogs", to the activity streams of those following you.

Your message can be up to 1900 characters long, and can be enhanced using @-targets, hashtags, links, and file attachments.

Users can Comment on your post or Like, Share, Follow Up and View your post.

## Questions

The **Ask a Question** tab allows entry of a question, which gains higher visibility (via notifications) and has different available responses than a regular microblog post.

Instead of a comment option, colleagues can reply with an **answer**. The initial poster can mark any number of the responses as answers; they can also unmark them and delete them.

## Polls

The **Ask a Question** tab also allows entry of a poll, by clicking the bargraph icon below where the question is typed.

This opens a set of text boxes into which poll answers can be typed.

Users see these options for poll answers in the post, and check the box of the poll answer they want directly in the Activity Stream.

After any of the choices have been picked, the poll displays the choices in order of the most- selected to least-selected options. It does not indicate who else has voted, nor how.

It does show bars indicating the percentage of the vote each option has received, and shows the number of actual votes received by any option when you mouse over it. Users can swap their poll choice at any time.

Polls do not have a **mark as answer** function, and the **Answer** link that normally appears for questions is a **Comment** link for polls.

The activity stream web part contains a specific filter for polls.

## Private Messages

Use the Private Message tab to create a post that will only be seen by the person you @ target. For further details, see @ Targeting in the topic Crafting posts.

You can begin typing a regular post, then decide to change it to a private message by clicking the **Private Message** tab.

The background turns yellow and a lock icon appears to the right to make it more obvious when you're typing a private versus a public message.

You must target at least one person to send a private message, but you cannot target groups.

> **Note:**
> Unless your organization has opted to not allow it, the person you send the private message to will be able to subsequently share the message with other individuals or communities.

Before they can widen the audience for your message, however, they will see a warning that the message will no longer be private.

## Sharing

Most user posts, and some other activity stream items, contain a **Share** link.

You can access this by clicking the **More** link in any post. Click **Share** to rebroadcast an item. A dialog box allows you to enter an optional prepended message.

The share is considered to be a new microblog message from you that, in most cases, is public.

Everyone who follows you can see it in their main stream, and anyone you specify by an @ target. If you @ target a private community, it appears only in that community.

Before version 3.0, shares taken from a community would appear in the originating item's community. This only happens when done from the community site itself, and if the share targets a private community, only when the global option **Enforce preservation of activity event privacy** is not set.

The Share feature has been reworked in version 5.1. Sharing no longer creates a new item, it just makes the existing stream item visible to all of your followers and adds your text as a comment.

## Crafting posts

### @ Targeting

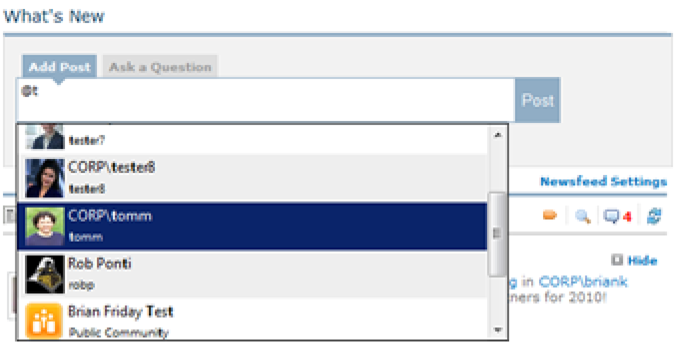
Microblog messages can be targeted at specific individuals, communities, or spheres. Typing the @ symbol in this box followed by a few characters of the user's, community's, or sphere's name will cause a list of colleagues, communities and spheres that match the letters to be displayed.

A user can @ target to any community that is public and discoverable. If your organization has not activated the "Include all public discoverable groups in autocomplete when @targeting" optional behavior, then only communities that the user is following appears as autocomplete options; for other public discoverable communities, they have to type out the complete @ name (such as @[Product Management]).

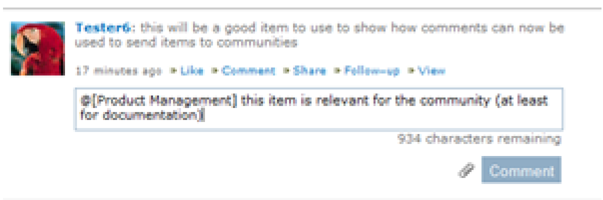
Private, non-discoverable communities that the user is not following will not route the message even if the user manages to guess the @ name of the community.

Users can also add @ targets to comments and answers. If the response targets a community, the entire activity stream entry (the event and any comments or answers) is visible in that community activity stream (even though the community was never mentioned in the original item). If a user targets a private community or sphere in a comment or answer, a warning message is displayed.

Only your colleagues will auto- suggest when you start typing their names after the @ sign. If you aren't following someone as a colleague, that person won't be auto- suggested to you but you could still target him if you know his ID, or using his email address (if v2.1 or higher).




*Screenshot 810: Using @target in post*



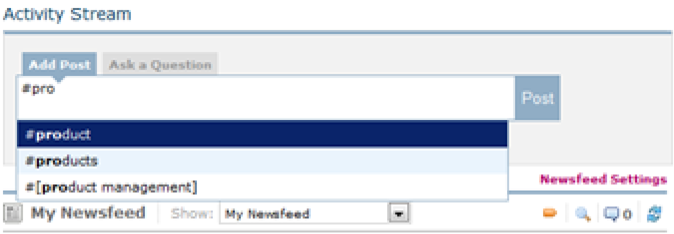

*Screenshot 811: Using @target in comment*

### Hashtags

Using the hashtag (#) symbol allows you to indicate a keyword such as #products. The "#" and keyword together are referred to as a "hashtag". Users can then filter the activity stream on a particular hashtag.

Users also get content with hashtags matching their **Interests** and **Ask Me About** fields (microblogs and questions, respectively).

Hashtags may contain letters, numbers, underscores, dashes, and periods. Enclosing the keyword portion in square brackets allows spaces to be used as well.




*Screenshot 812: Using hashtag*

## Hashtag autocomplete

When a user begins typing a hashtag, a drop down list appears to the user, containing hashtag suggestions pulled from previously used hashtags, and from the user's **Interests** and **Ask Me About** fields.

This helps make the post, question, or response more likely to be found by whoever is monitoring the existing topic.

Your organization may opt to have additional hashtag suggestions pulled from the SharePoint tag store (from the Enterprise Metadata Service).

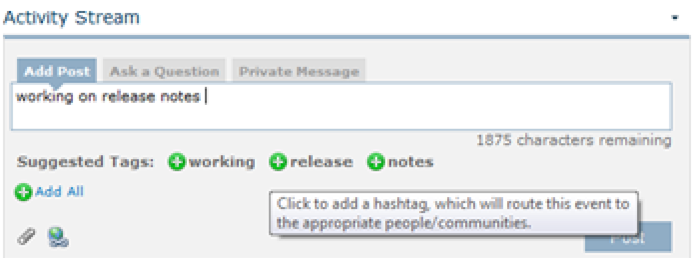
## Hashtag suggestions

When the Hashtag Suggestions feature is enabled by your organization, users entering a post will receive a suggestion to convert a word they typed into a hashtag, when that word has previously been used by others in your organization as a hashtag.

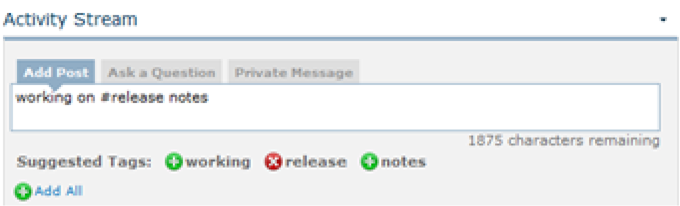
Clicking on any suggestion converts that word into a hashtag by adding the # symbol in front of it. Clicking **Add All** performs all the suggested hashtag conversions.

To limit potential performance impacts, only single-term hashtags is suggested.

This feature helps increase user indexing of content by users who are not accustomed to specifying hashtags, or who don't know that they can do it.




*Screenshot 813: Click to add hashtag*

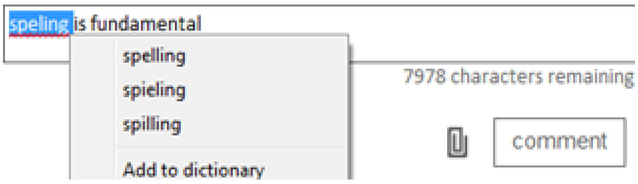



*Screenshot 814: Hashtag added*

## Spellcheck

If your browser supports spellcheck, posts and comments you type will show potential spelling issues. In Internet Explorer, you can right- click on the underlined text to get options.


*Screenshot 815: Wrong spelling indicated*




*Screenshot 816: Right click to correct spelling*

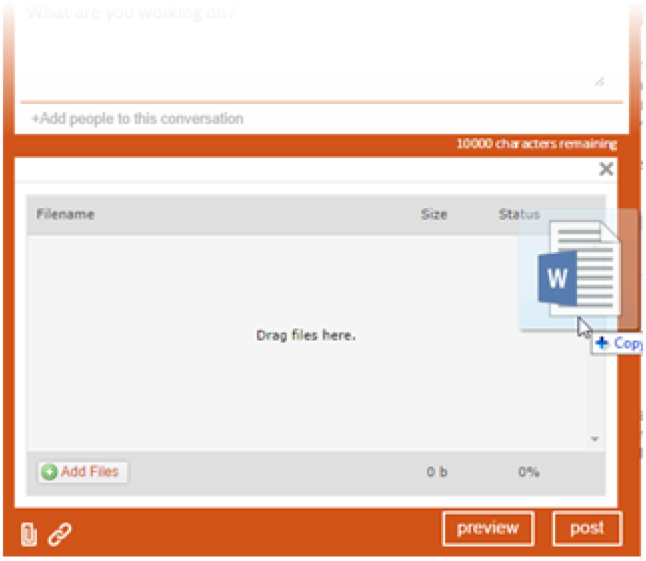
## Multiple file attachment upload

The file upload control is available when creating posts, questions, comments, and answers. It expands a dialog box for a user to browse to files (by clicking the "Add Files" button) or to drag and drop files in, to be included as attachments to a post. If the user selects an image file, it will be uploaded to the Shared Pictures library and rendered in the activity stream.

Other file types will be uploaded to the Shared Documents library and will have a link to the file in the activity stream.

Files are always uploaded where the user is acting (e.g. if a user adds a file to a question that included a community name like @[Product Mgt] but is doing that on the **My Newsfeed** page of their **My Site**, the file is added in the user's **My Content** area, and not on the community site).

If a user does not have access to upload a file in that site, the is not display.

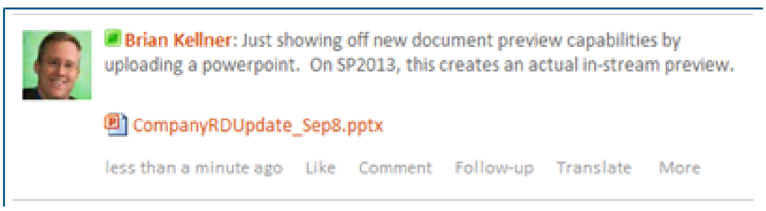



*Screenshot 817: Drag and drop file to upload*

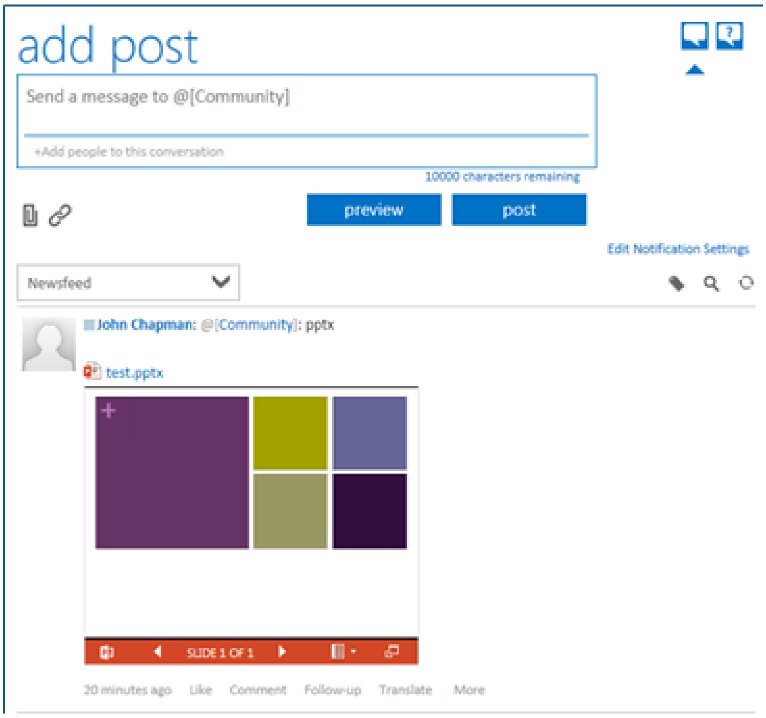
## Display and preview of attached documents

Attached documents appear as a link within the post that opens the document. These links have an icon aside them that indicates the document type.

On SharePoint 2013 with Office Web Apps installed, an in-stream preview of the document is provided below the attachment link.




*Screenshot 818: Document appear as link*



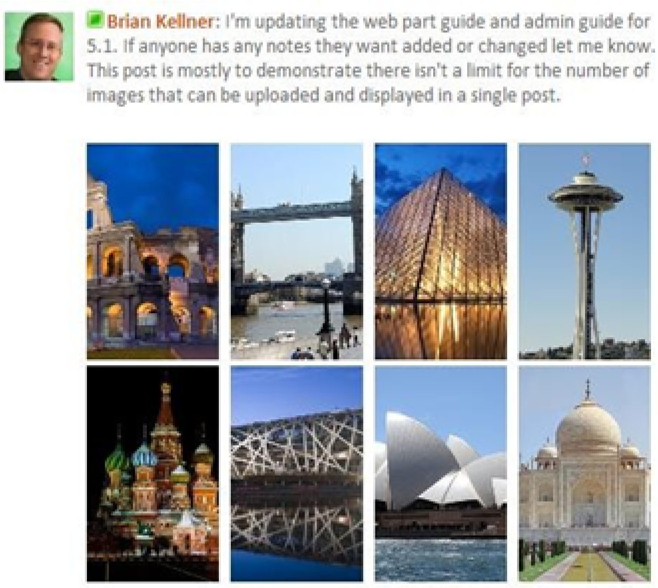

*Screenshot 819: Preview of document*

## Display and preview of multiple attached images

Attached images are displayed within the post.

For posts with multiple image attachments, to avoid having a very tall post that stretches far down the stream, the images are grouped into a portfolio to fit within the width of the stream.

Each image can be clicked individually to view the full image.



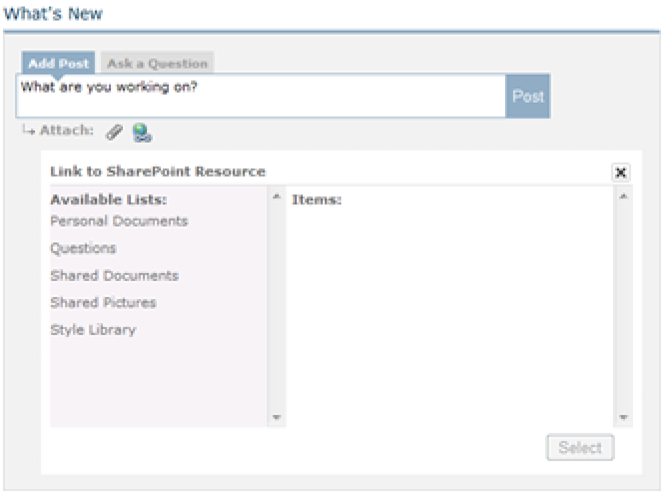

*Screenshot 820: Click thumbnail to view full image*

## SharePoint resource selector

The SharePoint resource selector makes it easy for users to quickly paste a link to a file or list item that already exists.

After the user selects the list, the ten most recently added items are displayed.

The user can then choose the appropriate item and the URL for that item will be pasted into the text field.




*Screenshot 821: List of ten most recently added items*

## Post formatting

In the 4.0 release, Aurea Social introduced support for several tags (in "BBCode" syntax) that allow formatting of microblogs and questions. This was expanded in the 4.5 release.

Precede the text you want to format with one of the tags below:

> **Note:**
> Each of these tags needs a corresponding closing tag on the other side of the text (for example [/b] indicates the end of bold tag).
> The [img] tag needs a URL to an image.

- [b] bold (* Pre-4.0: You can alternatively make a single word bold by surrounding it by asterisks).
- [i] italics
- [u] underline [br] line break
- [del] delete (strikethrough) [img] image
- [h1] header1 [h2] header2 [h3] header3 [h4] header4 [h5] header5 [h6] header6
- [code] source code or script. Text displays with fixed-width characters, as typed.
- [img] an image. Text must be an url to an image with no leading or trailing spaces.
- [url] a hyperlink. Format can be [url=http://www.Skyvera.com]Click For Skyvera[/url] or [url]http://www.Skyvera.com[/url]. (( ) Pre-4.0: You can alternatively specify your own link text by typing the URL then following this immediately with the link text in parentheses.)
- [ul] unordered (bulleted) list [ol] ordered (numbered) list
- [li] list item for ul and ol [table] a table
- [tr] a table row [td] a table cell

These tags are typed into the entry field.

An example might be This is [b] bold [/b]

This would display as: This is **bold**


*Screenshot 822: See the bold title*

## Visual post formatting

In the 5.0 release, Aurea Social introduced an easier and more discoverable way to format posts with the optional BBCode post editor.

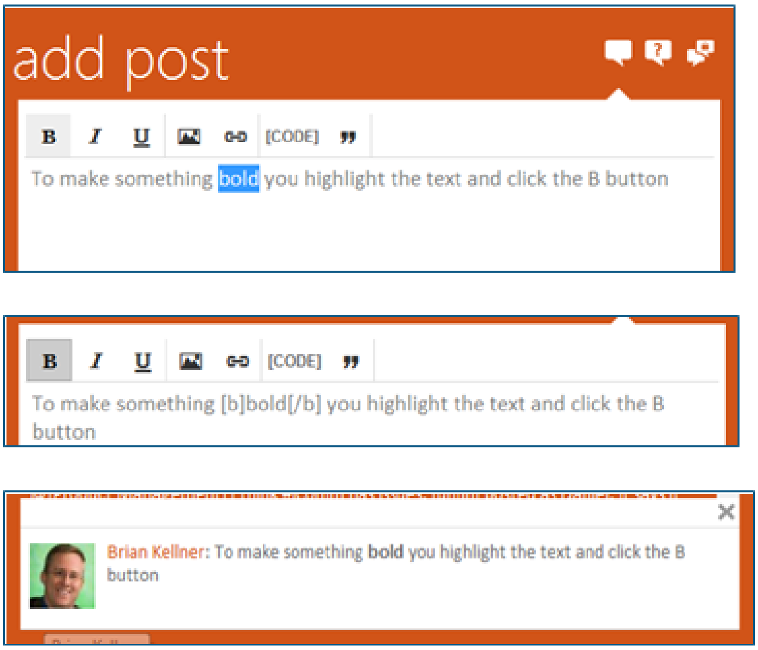
When activated in your organization by an option in SharePoint Central Administration, a set of controls will be displayed when the user clicks in the post box.

By highlighting some of the text to be posted and clicking a control, the BBCode tags that are needed to achieve the desired formatting are automatically added around the highlighted text.

The user can then see how this will look by pressing the Preview button. This displays the post as it appears in the activity stream.

The editor does not show all of the possible BBCode controls.

For example, the “header” designations like [h1] [/h1] are not shown. Also, bulleting controls are not shown as they require adding both the top level pair of tags as well as pair of tags for each bullet item and this is difficult to show with a single button.




*Screenshot 823: Demonstrating Visual post formatting*

## Automatic question detection

Sometimes a user means to ask a question, but doesn't select the **question** tab. Aurea Social detects when a post ends with a question mark and asks the user if they meant to ask a question.

If the user selects **Yes**, the item is changed from a **Post** to a **Question**.

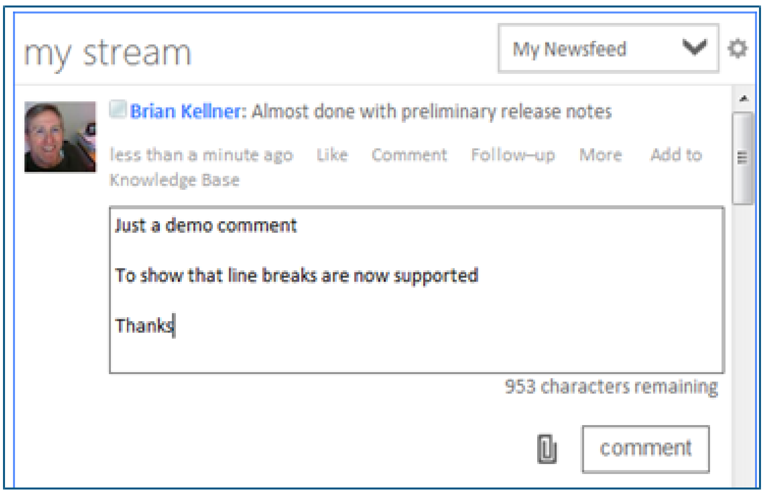
## Reading an item

## Liking and Commenting

Users can click **Like** on a microblog entry in the activity stream to indicate positive feedback when they don't have a comment to add. Clicking **Comment** allows them to post a response or add to the conversation. Either action causes the user to get notifications for any future likes or comments on that item.

Users can also **Like** a comment or answer (but cannot comment on a comment or answer). By default, the user who made the comment or answer will get a notification when someone "likes" it, but is able to opt out of this kind of notification.

Comments can include line breaks as well. Click the Comment button to submit the comment.



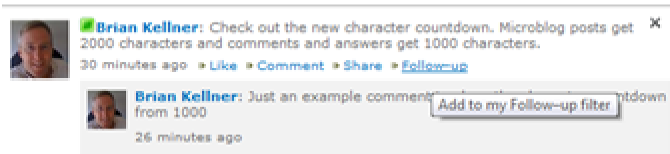

*Screenshot 824: Click comment*


*Screenshot 825: Comment submitted*

## Flagging for later follow-up

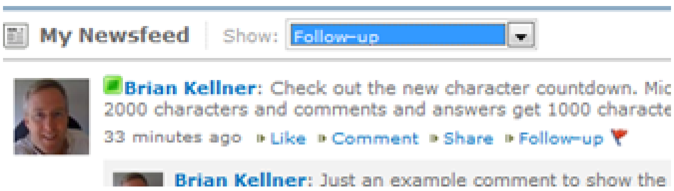
The Follow-up control lets you mark items in the stream to be able to go back to them more easily later.

When you click the **Follow-up** link, a flag appears to the right of the link, and is displayed every time you view the item until you unflag it by clicking the **Follow-up** link again.



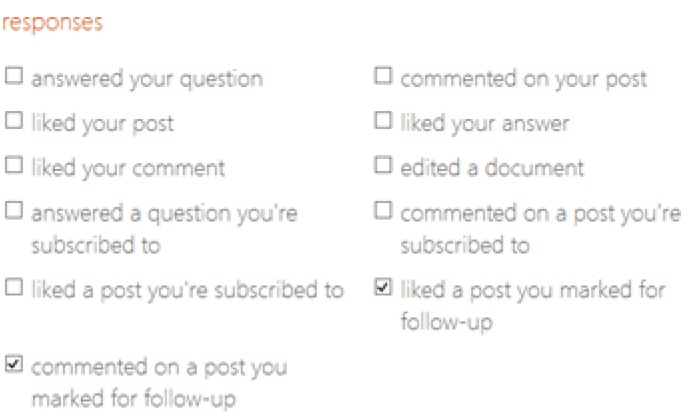

*Screenshot 826: Click Follow-up link*

Selecting the **Follow-up** filter in the **Show:** pull-down list displays all items you have marked with the follow-up flag.




Starting in the 5.1 release, it is now possible to get notifications when there are replies or likes on an item you have flagged for follow-up.

This is controlled by the two options in the Notifications settings menu (See screenshot below).

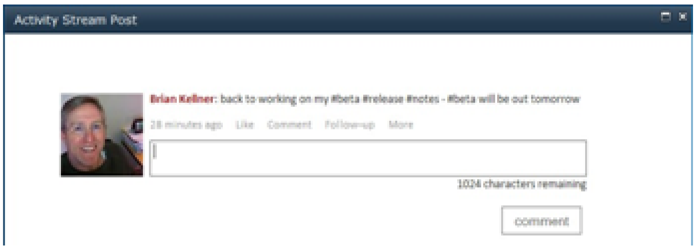



## View

Each stream item has its own individual item display page, that is used to access the item from SharePoint-integrated search results.

You can view this page in a popup when viewing the item in the **Activity Stream** web part by clicking **View** from within the item's **More** menu.

All actions a user can take on the post from within the **Activity Stream** web part can be taken from this page as well.

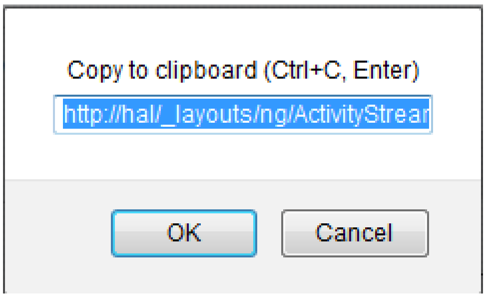



## Get link

To get the address of an item's dedicated page (see View entry above), open the **More** menu for the item and click **Get link**.

This opens a popup from which you can easily copy the address.

Providing this address to others is an easy way to direct them to a specific conversation they may not have seen.




*Screenshot 827: Copy the address*

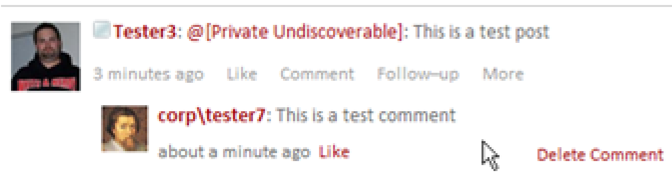
## Editing

## Deleting Events, Comments, and Likes

Users can delete their comments and likes from an item, and delete any comment they authored.


*Screenshot 828: Click unlike to remove a like*

To delete their like, users need only click the **Unlike** link that shows where the "Like" link had once been.




*Screenshot 829: To delete like click Unlike*

To delete their comment, they need to drag the mouse cursor over the comment, and a **Delete Comment** link appears to the right. Those with the **Delete Events** global permission can also delete the comments of others.

If the global **Activity Authors Can Delete Comments** option is turned on, then the person whose event you have commented on can also delete your comment.

To delete their event, they must drag the mouse cursor over the item, and a down arrow icon will appear in the upper right of the item.

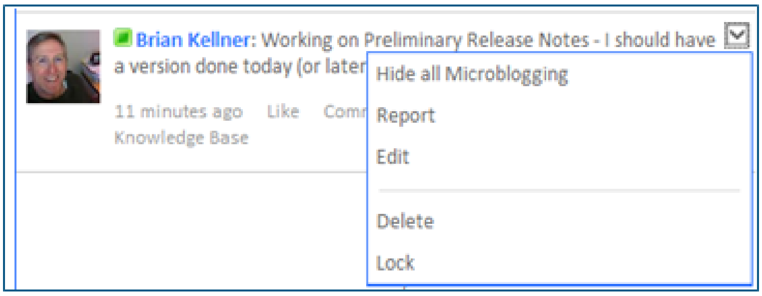
This opens a menu that has a delete option on it. Owners of the community and those with the **Delete Events** global permission can also delete the events of others.

While deleting a comment means it is truly deleted from the system, deleting an activity stream item only results in its being removed from all displays, as it is stored in SharePoint's store.


## Editing

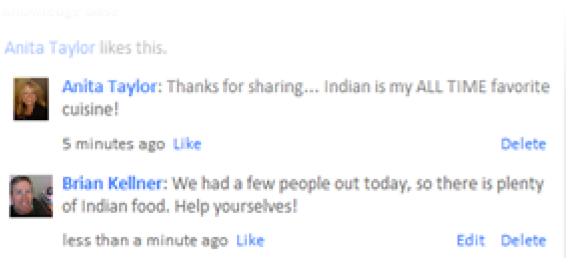
If your organization has enabled this optional feature, you will see an **Edit** option in the upper right corner menu of microblogs or questions you authored which have not yet had comments or likes added to them.

After making your changes, click **Save** to delete the old item and replace it with the edited version.




If you made the last comment or answer on a post, you will similarly have an edit option for that.

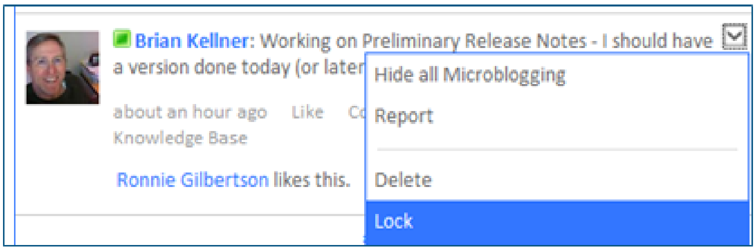
Starting in the 5.2 release, it is now possible to edit a post after it has likes or comments added if your company has chosen to enable this in Central Admin



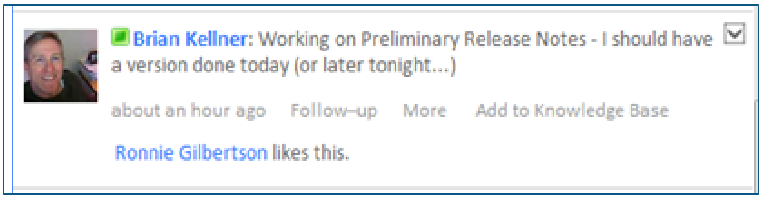

## Locking a stream item

In some cases, users want to stop comments from being added to an activity stream item.

To allow this, there is a "lock" setting on stream items which you create to let you do this. When you lock an item, the comment control is removed.

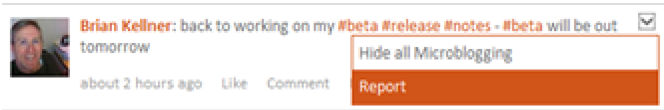



Any user who would have delete rights on an item will also have the rights to lock or unlock an item. This includes users with global delete rights and community owners.




## Reporting abuse

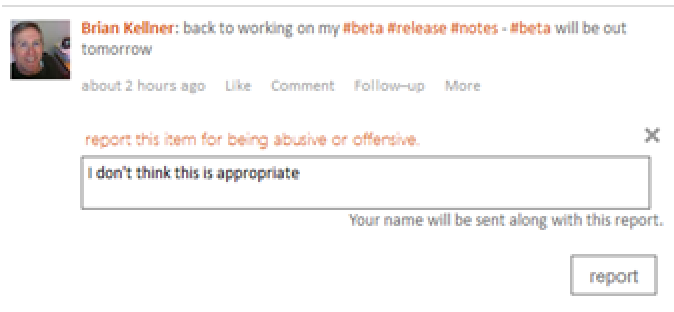
If the global Abuse Reporting feature has been activated, users can report any stream item as abusive by clicking the **Report** option in the upper right pull down menu of any stream item.




*Screenshot 830: Select Report*

This opens an input box where they can provide a reason for reporting the item. The abuse report is sent to a globally-configured email address. There is a global option to make the reports anonymous.

The user is informed as to whether their report is anonymous or not.




*Screenshot 831: Input box for providing reason*

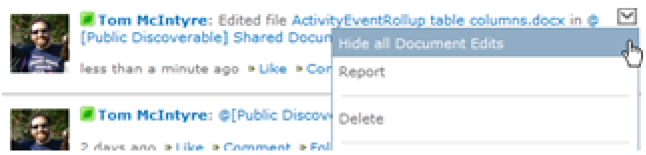
## Configuring

## Hiding all events of a certain type

You can hide all events of a particular type from your main **My Newsfeed** filter.

For example, if you'd rather not see any document edit events in your stream right now, you can hide them all, and the ones currently in the stream disappears from view.

You can later unhide these events and the hidden items will reappear. These changes do not apply anywhere other than the **My Newsfeed** filter.




*Screenshot 832: Hide / Un-hide events from here*

**Exception for SharePoint 2013**: While when running on SharePoint 2010 all stream events are stored by Aurea Social, including those originating from SharePoint, in SharePoint 2013 events coming from SharePoint are not, and therefore added directly to the stream from SharePoint.

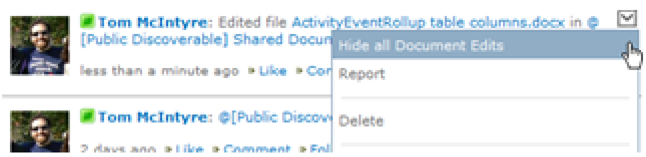
Aurea Social settings for hiding events of these types therefore have no effect when SharePoint is the source of the event.

In short, SharePoint 2013 events cannot be hidden from the Aurea Social activity stream.

For further details , see Aurea Social 2013 Vs 2010 Activity Stream.

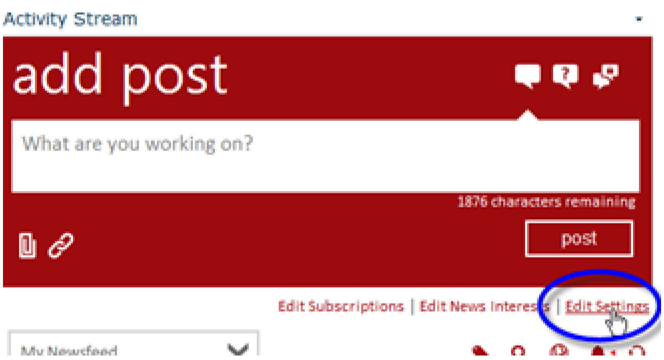
There are two ways to hide events of a certain type:

» One is by hovering over any item of that type, and opening the pulldown menu in the upper right. The top menu item will say something like **Hide all Document Edits** (in this example the event is one that announces a document was edited). Click to hide all events of that type.

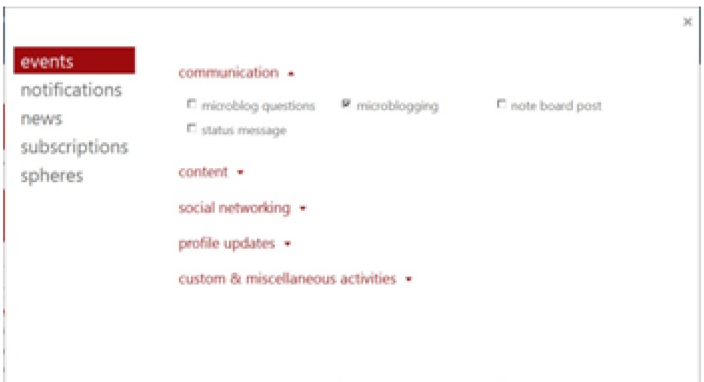



» The other way is to click the **Edit Settings** link, and choose the **events** page in the **Edit Settings** dialog that appears. Here, every event type is listed under one of a few different categories.

Uncheck to hide events of the specified type. You must refresh the stream for the setting to take effect.




*Screenshot 833: Click Edit Settings*




*Screenshot 834: Events screen*

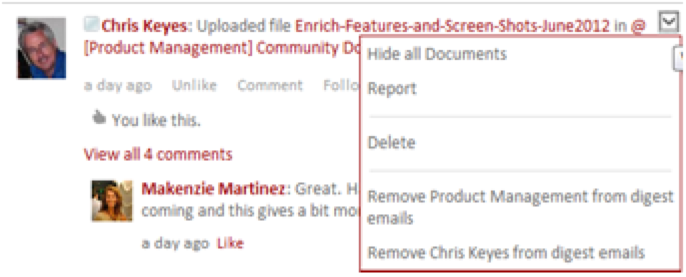
There is only one way to unhide events of a certain type, which is by checking the box for that type in the **Edit Settings** dialog.

## Digest email customization

Each user can adjust what they see in their digest emails from the Edit Settings dialog.

Some of the same options can be adjusted from stream items themselves.

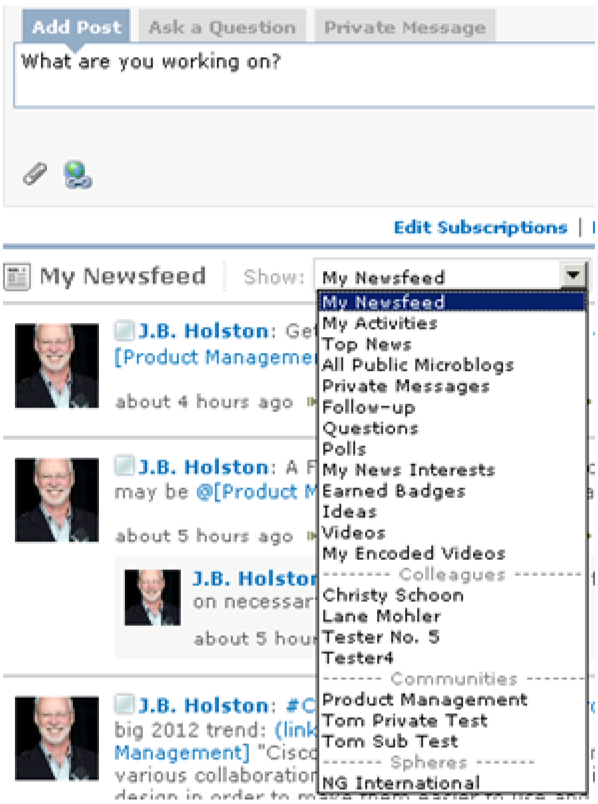
The upper right pulldown menu of any stream item will provide the user options to remove (or add) to their digest email the colleague who authored the post (if they are a colleague) and any communities mentioned in the post (if they follow that community).




## Finding items

## Finding stream items using preset filters

The **Show** drop-down filter, located just above the stream contents, lets the user pick from pre-defined and automatically-added filters.




*Screenshot 835: Add post tab*

There is a filter for every colleague, community, and sphere that you follow. At the top are up to 13 specialized filters (depending on which optional modules your organization has installed):

- **My Newsfeed** – Public items and private items you have permission to see, from the following:
- microblogs by your colleagues, yourself, and from communities you follow
- events of types you're following performed by a colleague, or in a community you follow
- questions containing a hashtag that is in your **Ask Me About** list
- posts containing a hashtag that is in your Interests
- RSS feed items that match one of your News Interests or from one of your RSS feed subscriptions
- any stream item that has been targeted at you; any other item you viewed in another filter and interacted with
- **Recently Posted** – Starting in the 5.1 release, this filter shows the same posts you would see in **My Newsfeed**. The posts are in reverse chronological order based on posting date (they do not come back to the top of the stream when a comment is added.)
- **My Activities** – System actions you took, items targeted at you, and microblogs you posted or responded to. Does not include items that you only "liked". Shows the same content as the **My Activities** web part on your public profile page.
- **Top News** - Your 100 most recent events ordered based on your historical preferences and the total amount of attention they have received.
- **All Public Items** – All public items in the system. Includes microblogs, questions, polls, ideas, news items, and more. Obeys event type options made in the Edit Settings dialog.
- **All Public Microblogs** – All public microblogs in the system (no questions, polls, ideas, events, or news items), including ones you wouldn't see in your my Newsfeed filter.
- **Private Messages** – All private messages sent by or received by you.
- **Follow-up** – All items that you have flagged for follow up (see Flagging for later follow-up, above).
- **Questions** – Public questions in the system, including ones you wouldn't see in your my Newsfeed filter. Also any private questions that you may access. Does not include polls.
- **Polls** - Public polls in the system, including ones you wouldn't see in your my Newsfeed filter. Also any private polls that you may access.
- **My News Interests** – For organizations with the News Stream module. RSS feed items that match one of your News Interests or from one of your RSS feed subscriptions.
- **Earned Badges** – For organizations with the Spotlight module. Shows all badges earned by anyone in the system.
- **Ideas** - For organizations with the Idea Stream module. Public ideas in the system, including ones you wouldn't see in your my Newsfeed filter. Also any private ideas that you may access.
- **Videos** - For organizations with the Video Stream module. Public video uploads, including ones you wouldn't see in your my Newsfeed filter.
- **My Encoded Videos** - For organizations with the Video Stream module. All videos you uploaded and that are now ready for viewing in the stream.

## Default filter

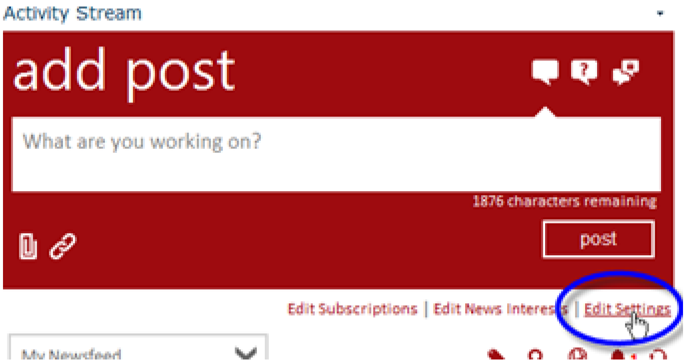
On page load, the Activity Stream web part defaults to the My Newsfeed filter, unless that would result in no items being displayed, in which case it switches to the All Public Microblogs filter.

Your organization may instead opt to default to the Top News filter, the All Public Microblogs filter, the Questions filter or the All Public Items filter.

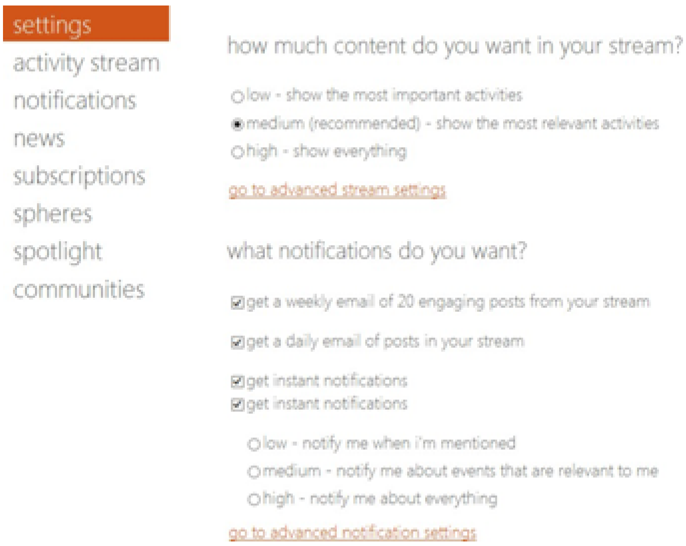
Starting in version 5.1, the Recently Posted filter may be chosen as well.

## Newsfeed settings

The Edit Settings link opens the Edit Settings dialog, which allows a user to hide stream events based on type, configure options for digest and instant notification emails, configure news article subscriptions and interests, and manage/join spheres.




*Screenshot 836: Click Edit Settings*

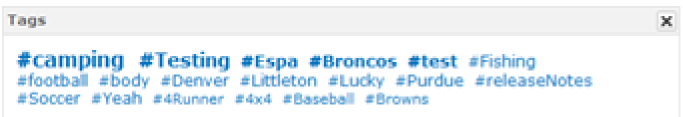



*Screenshot 837: Settings page*

## Finding microblogs using hashtags

Clicking the Tags icon will open a view of the twenty most common hashtags across all steam items you may see, including your news subscriptions, private messages, and public and private microblog messages and questions.

Click any hashtag to filter the stream down to items containing that hashtag, in the main entry or in any responses. You can also filter by clicking a hashtag within any item.




*Screenshot 838: Tags*

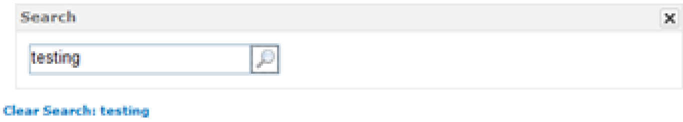
Starting in the 5.1 release, this section can be set to be automatically displayed when the page loads so that users do not need to click the tag control to see hashtags.

Starting in the 5.2 release, multiple hashtags can be selected to filter the view to only items which match all the selected hashtags.

## Finding microblogs using keyword search

The Search icon opens a search field, which will match text with any public update or comment, or author's name.

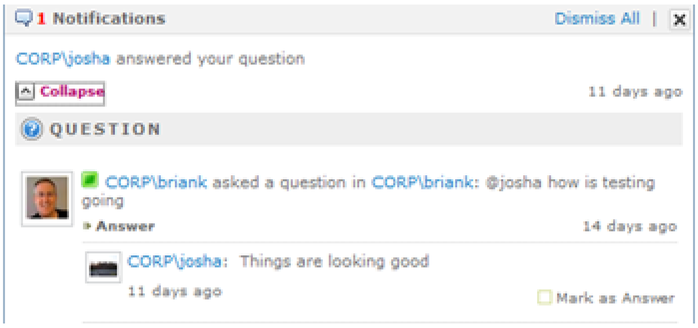

*Screenshot 839: Newsfeed Settings*




This tool also allows the user to “clear” a hashtag or text search/filter and go back to the default view.

## Notifications

The Notifications icon displays unviewed notifications. A user can expand the details of a particular notification and mark it as viewed or use the **Dismiss All** option to clear the list.

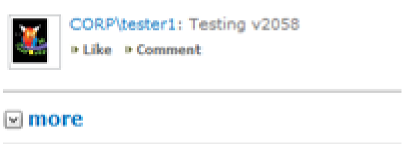



*Screenshot 840: Expand / collapse detail*

Users can receive notification emails and reply to those emails to add comments.

## Displaying more results

At the bottom of the Activity Stream, the **more** link allows the user to get an additional set of results. There is no longer any limit to how many times you can press **more** to get additional results.




However, in some view filters you cannot page back to items that have not been created or responded to within the last 30 days. These filters include:

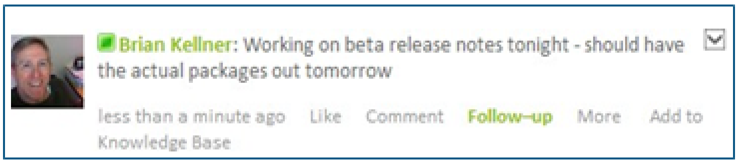
- My Newsfeed
- All Public Microblogs
- News Interests
- Questions
- Polls

Top News only ever shows your 100 most recent events. For all other filters, you can continue back indefinitely.

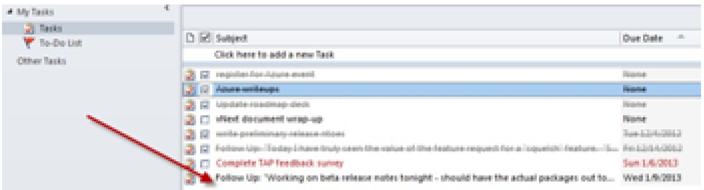
## Behaviour

### Follow-up generates exchange task

This is an optional feature that administrators can turn on. When you mark an item for follow-up in the activity stream, a task is automatically created for that item in Exchange (these screenshots show the view as seen from Outlook.) The task contains the text of the item.

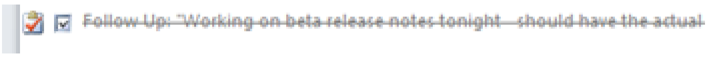



*Screenshot 841: Click Follow-up*



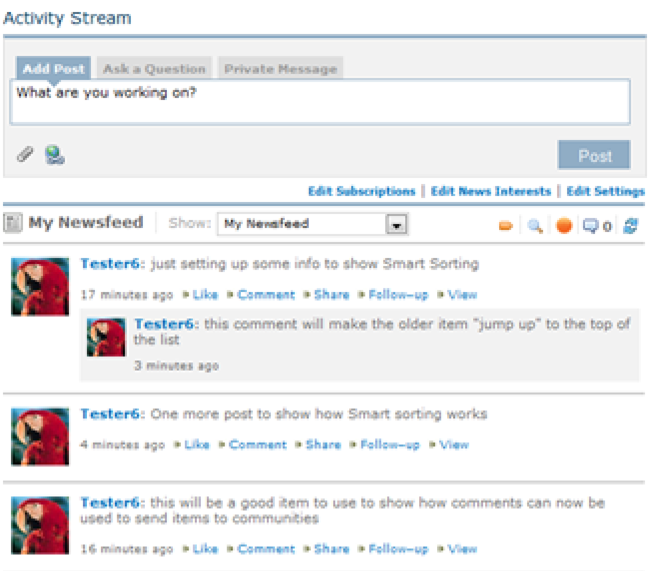
*Screenshot 842: Follow up task automatically created in outlook*

Un-selecting the "follow-up" flag in Aurea Social causes this task to be marked as completed in Outlook.



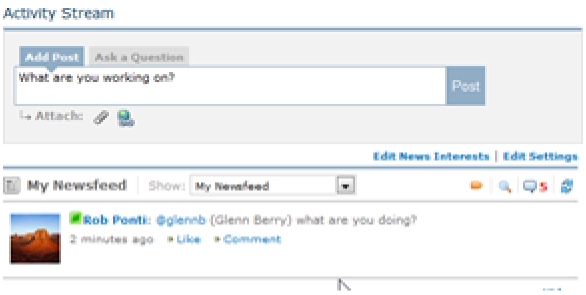

### Smart sorting of items

All activity stream filters (excluding "Top News" - see Finding stream items using preset filters) sort items by the date of the last comment or answer. This means that items "bubble up to the top" when people react to them.



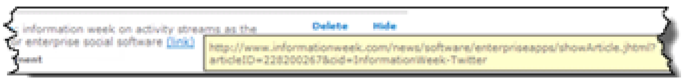

### Automatic full name appending

This is an optional feature that administrators can turn on. The full name of the user being targeted will be added inside parentheses following the @userID. This is useful in organizations where the userID does not have a clear relation to the user name.




## Link shortening

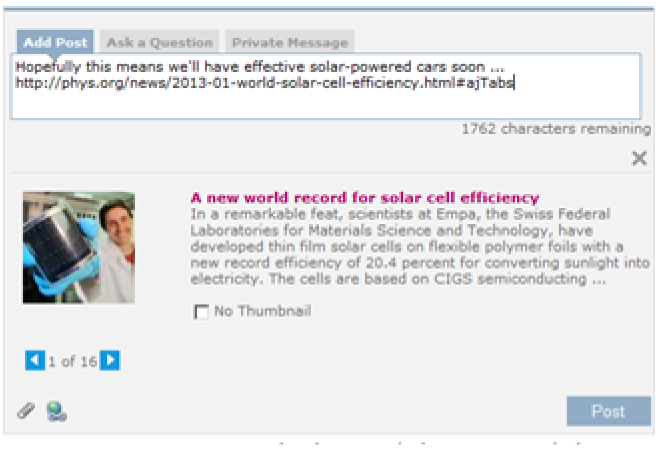
The Activity Stream part shortens web links to increase readability. Hyperlinks in the stream are replaced with (link). When the cursor hovers over the (link) text, the full URL is displayed.

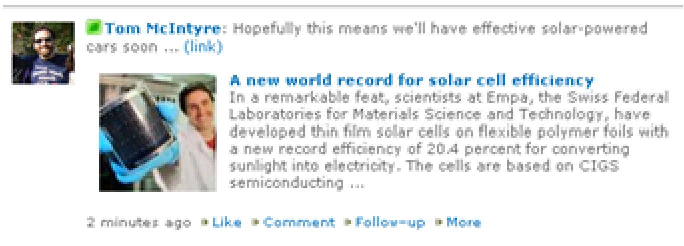




## Link preview with thumbnail and synopsis

When a user enters a microblog or question that contains a web page link, she is shown a preview of the web page that the link points to, including a thumbnail image, the page title, and a synopsis of the page (when the link goes to a specific article, the synopsis can be quite long).

When the item appears in the stream, the thumbnail, title and synopsis are included below the user's text.




The user can make the following changes before posting:

1. change the image used for the thumbnail.

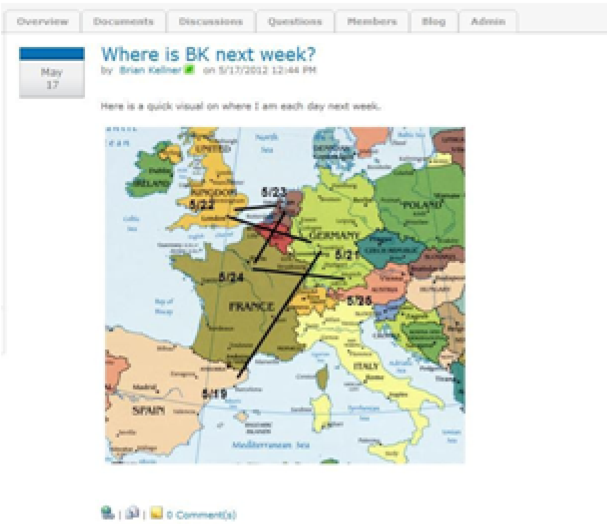
2. not include a thumbnail at all by clicking the **No Thumbnail** box.

3. not include any preview at all by clicking ✖ to the upper right of the preview.

## Blog preview with picture and synopsis

Blog post stream events show a synopsis of the post and the first image in the blog post is automatically displayed in the activity stream event. In the screenshot of a blog post page to the right, the post has a short amount of text and an image of a map.

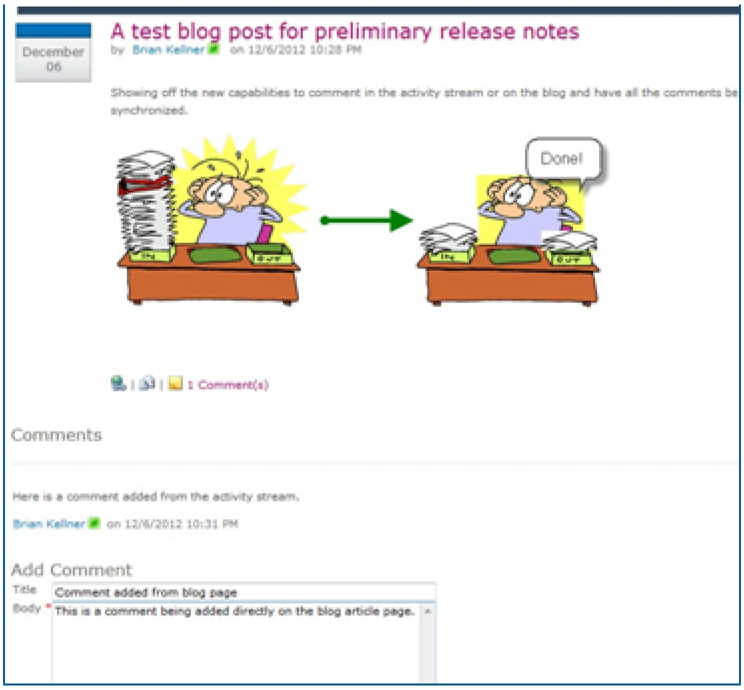
When a user views this in the activity stream, the image from the blog post is automatically included in the activity stream item and the initial portion of the blog text is included in the stream item as well (second picture to right).



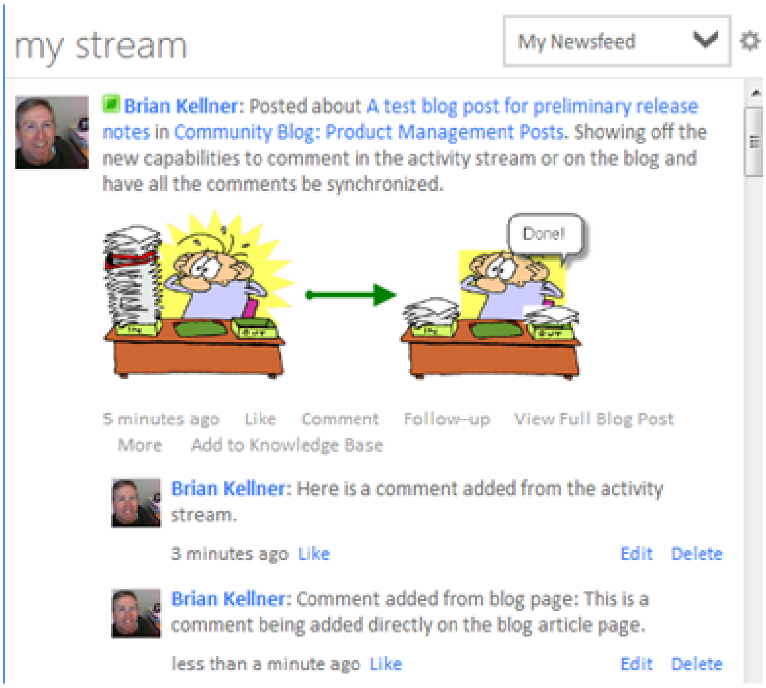


## Blog synchronization

When you add a comment on the activity stream item for a new blog post, that comment is automatically added back as a reply to the actual blog post on the blog site.

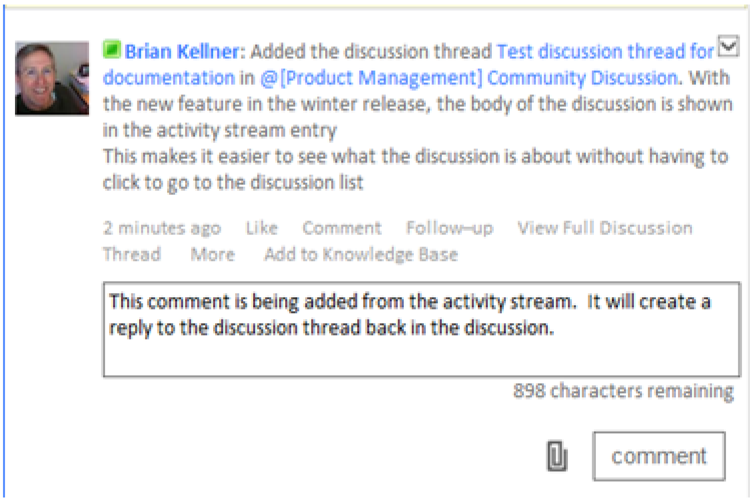


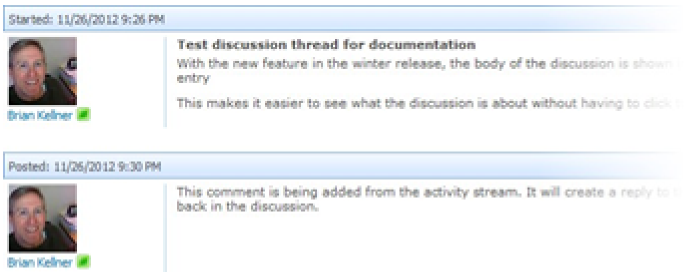

Similarly, if you create a reply directly in the blog site, that reply will become a comment on the activity stream item, and this causes the item to sort to the top of the stream (in views that use chronological ordering).



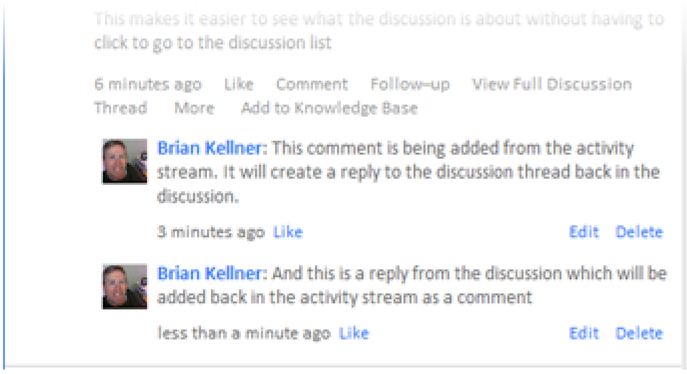

## Discussion synchronization

While most events about a new item just give a name and a link to the item, discussion activity stream events include the text of the actual discussion item in the activity stream post, so that you don't have to click to the discussion to read it.




When you add a comment on the activity stream item, that comment is automatically added back as a reply in the discussion. Similarly, if you create a reply in the discussion directly, that reply will become a comment on the activity stream item, and this will cause the item to sort to the top of the stream (in views that use chronological ordering).



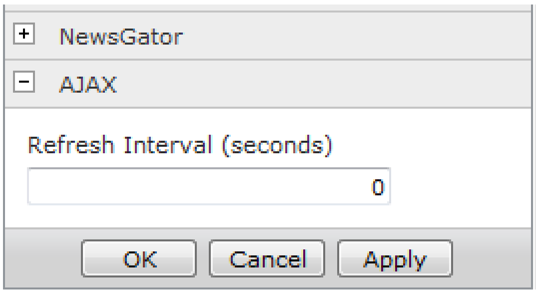

## Consolidation of document edit events

Multiple edits by the same person on the same document are consolidated to show as only one event in the activity stream. When a user edits and saves a document to SharePoint repeatedly, each edit action is saved, but only the most recent event will be displayed.

## Automatic refreshing

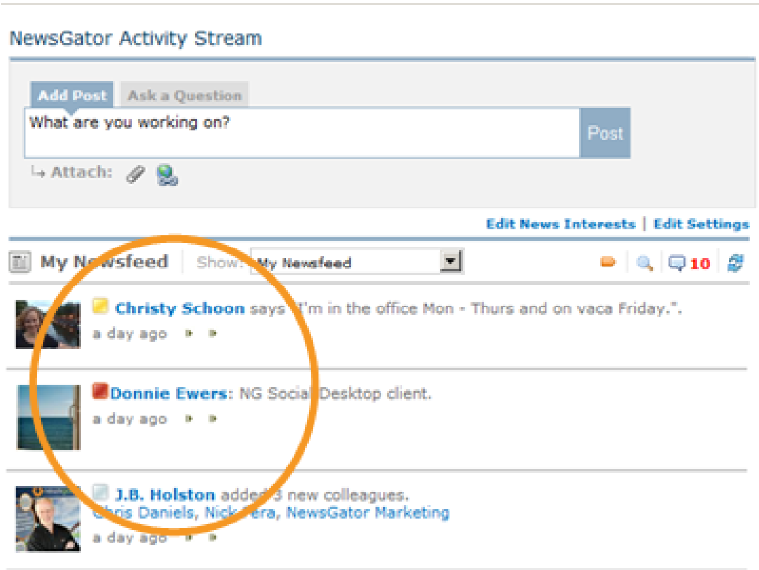
This behavior is disabled by default with the value of 0, and we recommend that you only enable this for limited cases where you want to have the stream refresh automatically during a short event for example.

We do not recommend enabling this for regular usage as automatic refreshes consume memory on client computers.




## Presence indication

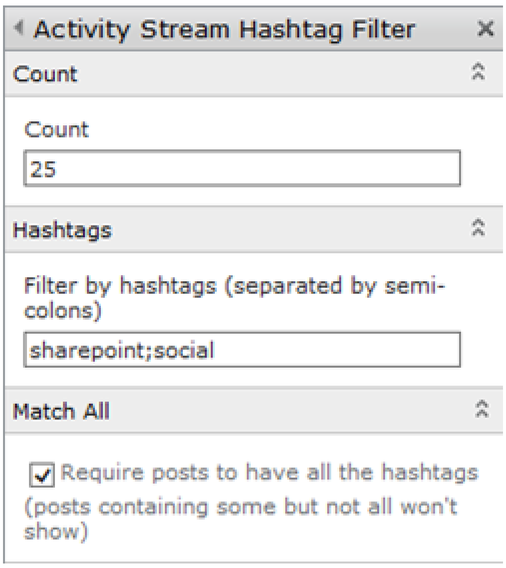
If a user is logged into Microsoft Lync (formerly OCS) and using Internet Explorer, their online presence information displays in the activity stream when they submit a post or question.



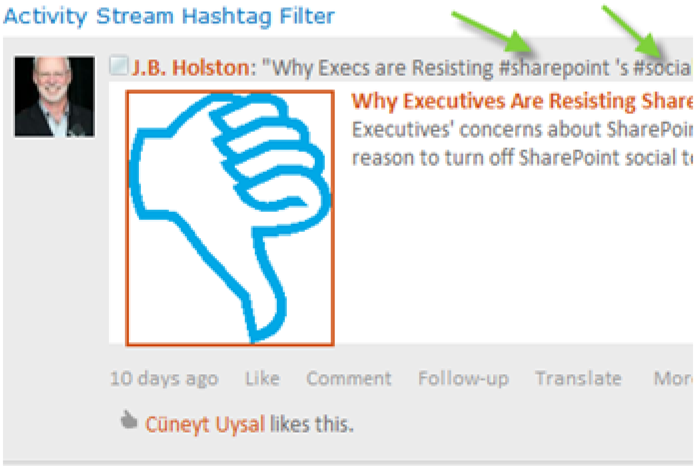

*Screenshot 843: Online status shown with yellow and red square*

## Activity Stream Hashtag Filter

The **Activity Stream Hashtag Filter** web part shows public events that match one or more hashtags with an option to require posts to have all hashtags specified.



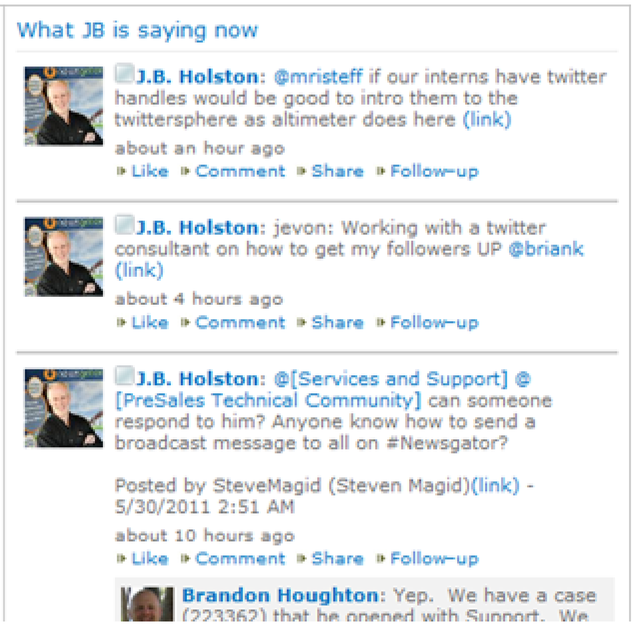

One use case for this is a landing page for a specific event or activity where everyone uses a particular hashtag.




## Activity Stream User Filter

Designed to show the public microblogs and questions of one or more admin-specified users. The most recent items are on top.

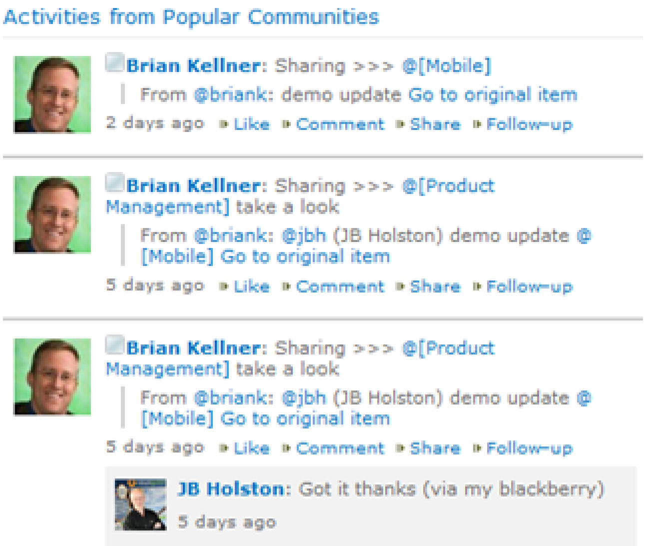
One example use case is to show the thoughts of a senior leader where everyone can easily view them without requiring users to add that leader as a colleague.




## Activity Stream community filter

Shows the updates from one or more admin-specified public communities.

One use case is to create a landing page around a particular topic and include all the updates from the relevant communities.




## Activity Stream Pivot viewer & Community Activity Stream Pivot viewer

Requires SilverLight 4 or higher.

Typically installed on a page other than My Newsfeed, but it provides a powerful personal filtering experience as well as some interesting reporting capabilities.

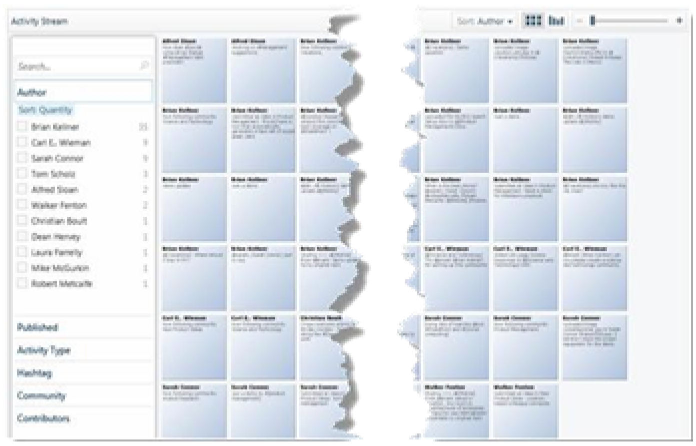
When the user first arrives on this page, the part shows a view of the user's activity feed in a graphical form.

In the top left corner, the view can be toggled between the user's activity stream or the **All Public Microblogs** view. Each of the headings in the left column can be expanded to show individual checkbox filters for each option.

As you check boxes, items matching that criteria will be kept in the view or added to the view and non- matching items will be removed.

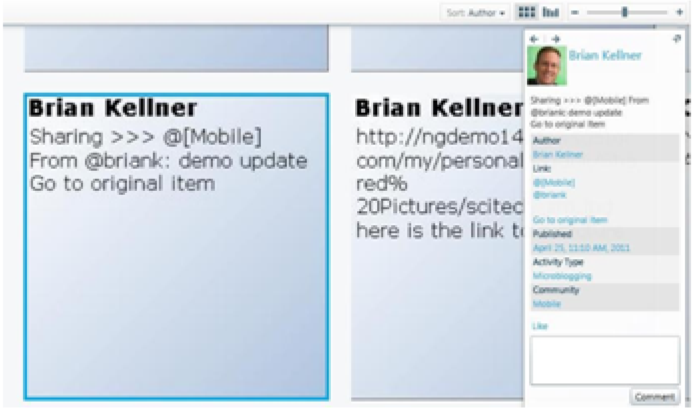
In the upper right, you can select to show the view by a different sort and a column vs. grid view.

The column view can be useful when viewing by published time. The slider control in the upper right allows zooming in our out on the view.



*Screenshot 844: Column view*

Clicking on an individual item presents a detailed view that allows seeing and adding likes and comments.



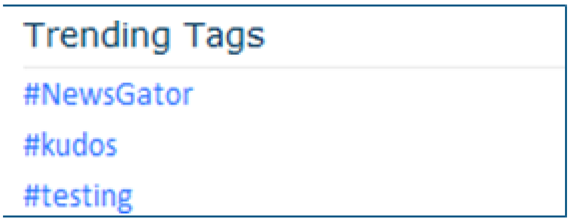

*Screenshot 845: Detailed view*

## Trending tags

While the activity stream web part and community activity stream web part each include a built-in tag cloud that shows the top 20 hashtags over the last 30 days, customers frequently want a way to show the top tags that are recent.

Trending Tags presents hashtags in the overall system that are popular within the last week, with a bias toward hashtags that are popular even more recently.

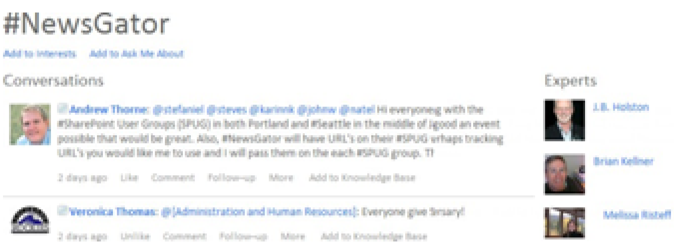
This part can be added to a My Site to match the user's personal feed, or placed on a community. For further details, see Trending Community Tags for a similar community-based web part.




*Screenshot 846: Trending tags*

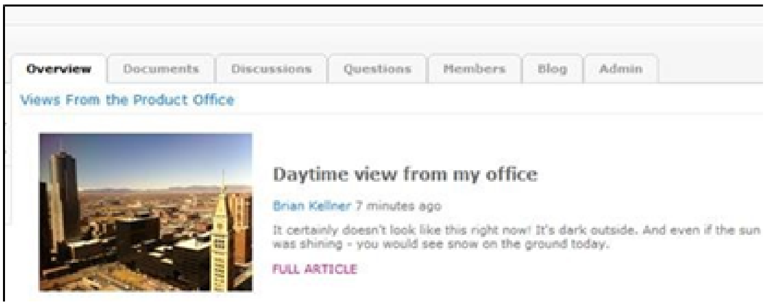
When a user clicks on a tag in this web part, they go to tag page that shows the hashtag, the options to add that tag to the user's Interests or **Ask Me About** fields in their profile, and the activity stream items containing that hashtag.

If the Spotlight module is installed, the user also sees the top scoring experts on that tag.



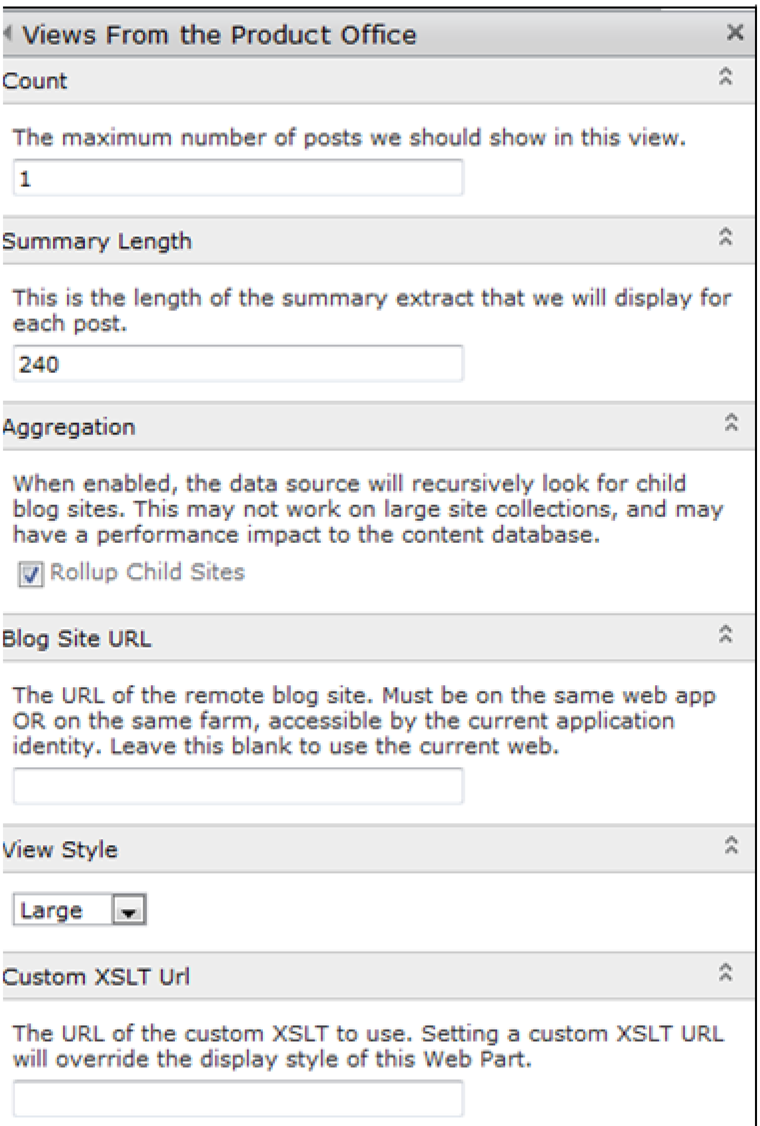

## Latest blog posts

Designed to make it easy to attractively display a summary of one or more blog posts on a page. This web part can be placed in communities or on any page.




*Screenshot 847: Latest Blog Posts screen*

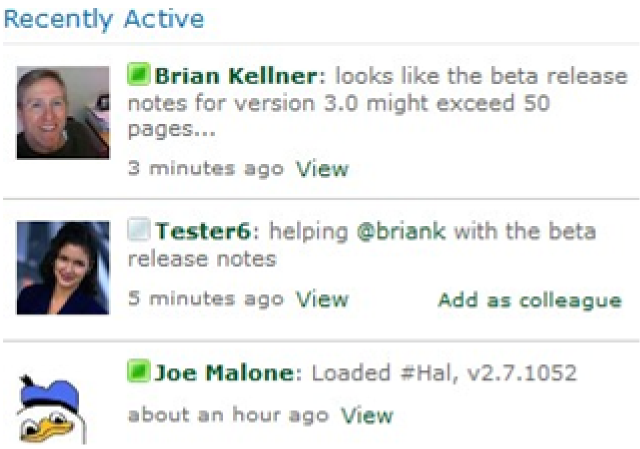
Latest Blog Posts has several settings to control the source blog(s) and display options, as shown in the second picture at right.




*Screenshot 848: Latest Blog Posts summary*

## Recently active

Recently Active shows the three most recent users that added a public microblogging update or asked a public question, and allows you to add them as a colleague.




*Screenshot 849: Recently active*

The two goals of this web part are:

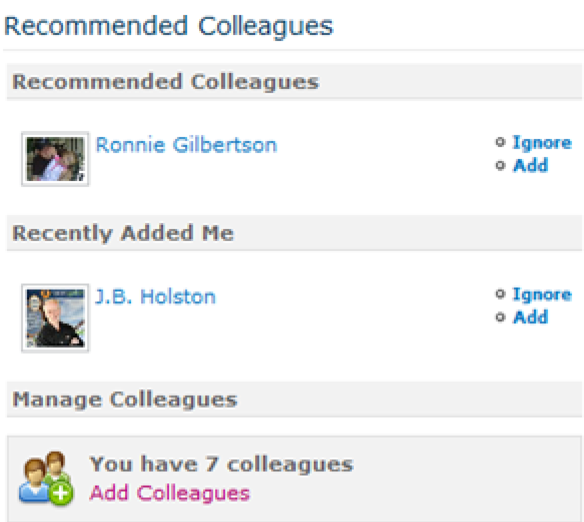
- to highlight the active users in the system, and
- provide a way for users to easily add new colleagues

> **Note:**
> Because this is highlighting a few people and not a true view of the stream, hashtags displayed here will not be links (that serve to filter the displayed contents).

Because viewers may want to interact with the stream items presented here, a "View" link has been added that opens the item, allowing commenting, liking, marking for follow-up, etc. on that item.

## Recommended colleagues

Recommended colleagues helps users discover and add new colleagues.




The top section recommends a colleague using data that Aurea Social has collected based on commonalities with community membership, colleagues, and highly active users.

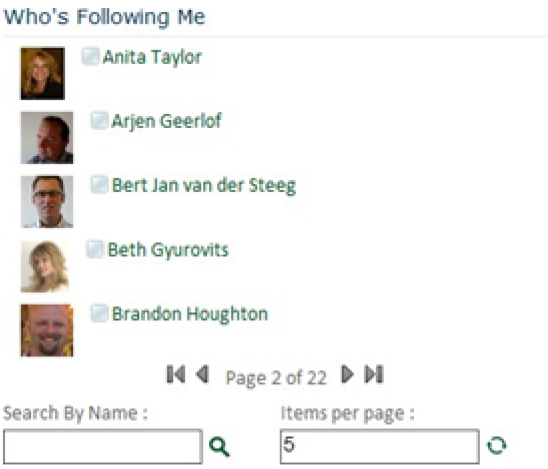
The **Recently Added Me** section shows the last person who has added you as a colleague (and who you have not yet added).

The **Add Colleagues** link in the Manage Colleagues section allows a user to manage his colleagues (e.g., edit, add, remove, and view).

## Who's following me

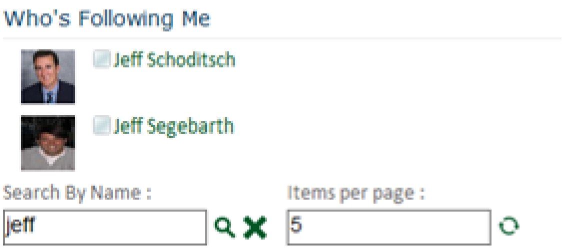
Who's Following Me is designed for placement on a user's profile page.

It shows an alphabetical list of other users who have added the user as a colleague.




*Screenshot 850: Five users shown by default*

By default, five people are shown at a time. Users can page through the whole list or use the search feature to look for specific followers.




*Screenshot 851: Specific followers searched*

## Documents followed

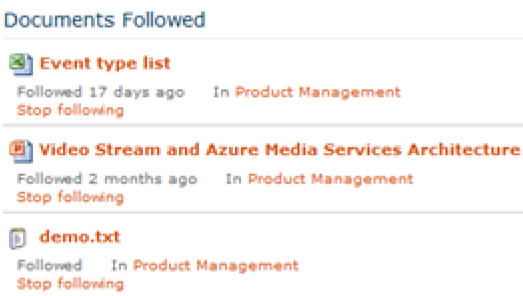
Documents Followed shows the user which documents they have opted to follow.

Document following allows a user to ensure they'll get notified about changes to a specific document.

This can be useful to do even when the user already gets activity events in their stream for the document due to its being in a followed community, because the user additionally gets notifications about changes to the document.

Users can only follow documents located in a site where the NewsGator Document Following feature has been turned on.

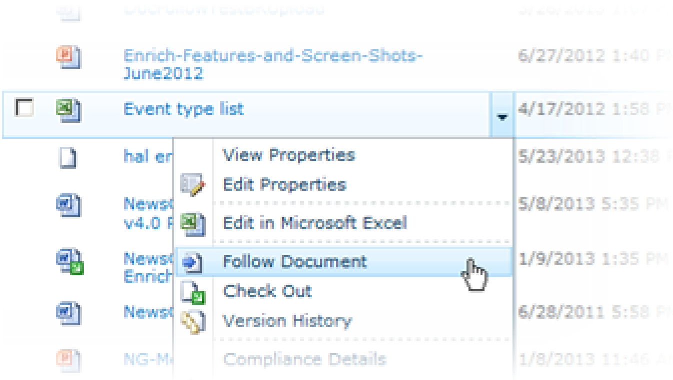
The user need not follow a community to follow one of its documents.




*Screenshot 852: Documents followed*

The option to follow a document is only available from SharePoint document library views, from the document's actions menu.

The document may be unfollowed from this same place, and also from the Documents Followed web part.




*Screenshot 853: Follow / Un-follow document*

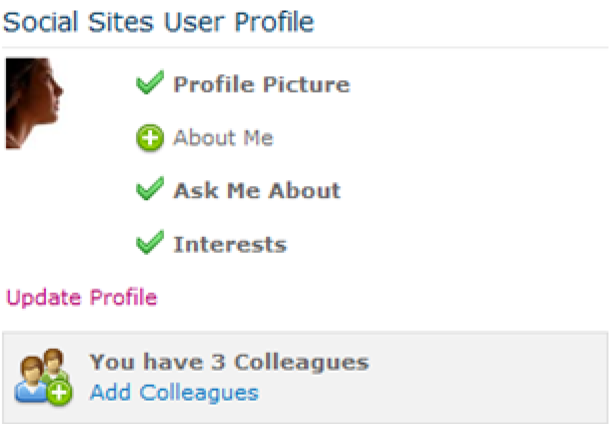
The user can also open the document, or the site that contains it, from the **Documents Followed** web part.

Documents are ordered with the most recently edited or followed document at the top.

## Social sites user profile

The Social Sites User Profile web part shows you which important profile items you have completed or still need to complete.

This feature provides the user with a visual checklist of important profile fields.




When each field is completed, it is displayed in bold along with a check mark. Fields that have no information show a "+" symbol and a non-bold name.

The user can click **Update Profile** to access the profile editing page.

## User detail report

Allows viewing the detailed behavior of users within the community.

After entering a search string and pressing the magnifying glass button, matching users are listed.


*Screenshot 854: Click on a specific user to open a display panel*

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.

## Embeddable three-function social control

Social features are available beyond Sharepoint. With a simple edit, your organization can place a three- function control on any page that can access your SharePoint server.

This allows users to tag the URL of the page within SharePoint, or add a note to it, and also share the page in the stream.


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.


*Screenshot 855: Adding a note*


*Screenshot 856: Tag function*

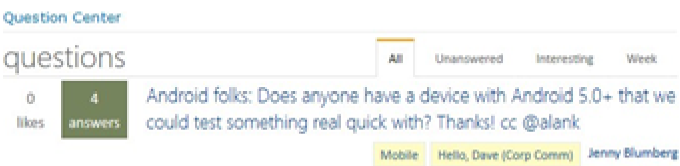
The tag function auto-completes with suggested tags.

All three actions (note, tag and share) creates new activity stream events.


*Screenshot 857: New activity stream events created*

## Question center

First introduced in the 5.1 release, this web part aggregates questions from around the system to make them more easily discoverable.




*Screenshot 858: Question Center*

Starting in the 5.2 release, this part can be scoped to only show questions from specified communities.

## 1.47.2 Community-finding web parts

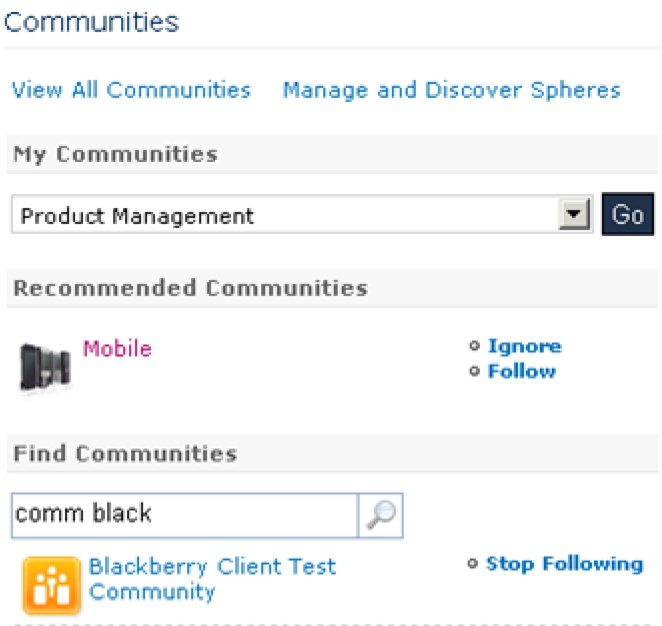
Below are the community- finding web parts:

## Communities

The Communities web part allows users to quickly navigate to any of their communities, recommends new communities, and helps to find discoverable communities by keyword or by browsing.

Keywords used for searching do not need to be complete words, but only match to the beginning portion of a word.

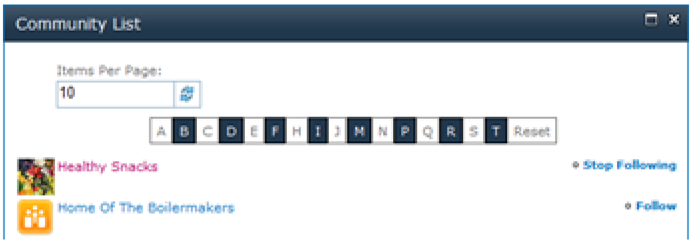
The features encapsulate the functionality of the **My Communities** and **Recommended Communities** web parts with additional functionality - in an all- in-one, compact design.




*Screenshot 859: Communities*

## Browse communities

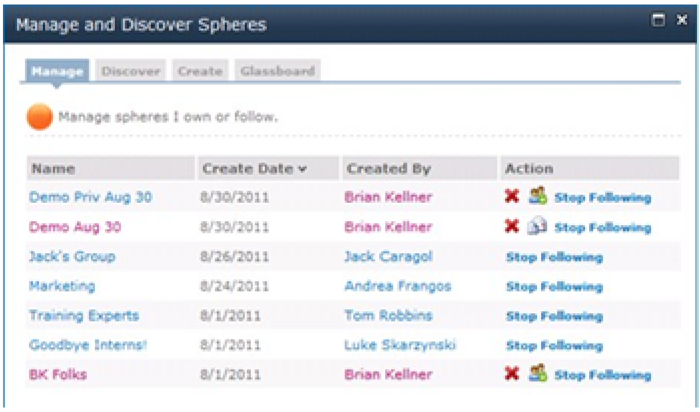
Clicking the **View All Communities** link displays a dialog box allowing users to browse through all discoverable communities, follow or unfollow them, or navigate to them.




*Screenshot 860: Community list*

## Manage and Discover Spheres

When Spheres functionality is enabled in Aurea Social, there will be a **Manage and Discover Spheres** link that opens a dialog box where users can manage spheres they own, interact with or unfollow the spheres they're in, find spheres to join, or create (if permitted) new ones.

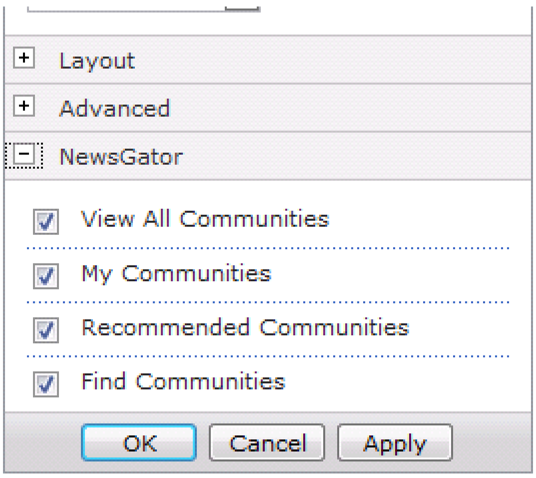



*Screenshot 861: Manage your spheres from this page*

## Visibility settings

Beginning in v2.1, this web part can be configured to display only the desired sections.

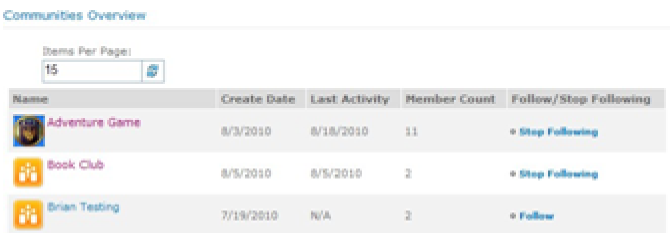
Unchecking any of the boxes within the "NewsGator" portion of the settings causes that portion of the web part to be hidden.




## Communities overview

The Communities Overview web part is meant to help discover and understand the status of the discoverable communities in the system.

The part displays all discoverable communities including the create date, date of last activity, the number of people following the community, and gives you the option to follow or stop following each community.




*Screenshot 862: Community Overview*

## Community portal view

Also known as Community Discovery Portal, this web part creates an attractive community discovery page to help organizations provide a single place for users to discover communities.

It features the ability to specify some communities as promoted to ensure they always display. It also shows recommended communities and provides users with tag and text search options for discovering communities.


The above screenshot shows two communities which are "promoted". This means they were selected by an owner of this site.

You can have multiple community portal pages – each one that is in a separate site collection can have a separate list of promoted communities.

The default view also contains recommended communities which looks at the user's "Interests" field in the profile as well as things like number of colleagues following those communities to find matches.

The popular communities have high amounts of activity as well as high numbers of followers.

The controls on the right allow searching and browsing by specific categories.

This gives users access to longer lists of results than the default view.

The browse by topic shows tags that have been entered either as a Classification or Interest Community Tag.

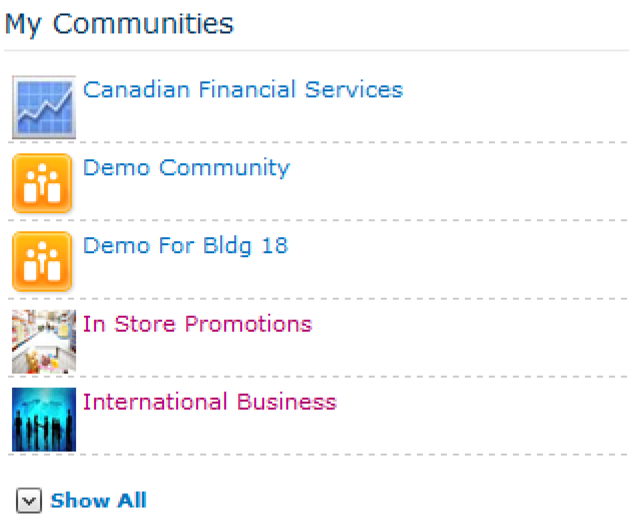
## My communities

My Communities shows visitors to your profile page links to all of the discoverable communities you are following.

On initial view, only five of the communities you follow are displayed.

Visitors can click the **Show All** link to see the list expand to display all the communities you follow, should there be more than five.

This cannot be configured to show any number other than five on initial display.

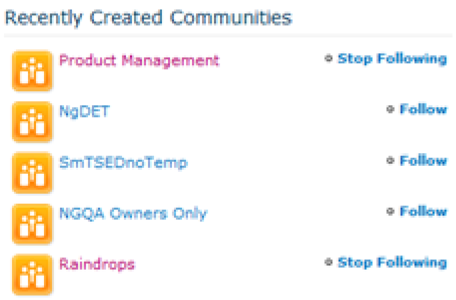



*Screenshot 863: My Communities*

### Recently created communities

Recently Created Communities displays the five most recently created, discoverable communities. It allows users to follow public communities and provides a link to private communities.

This feature helps users discover new communities as they are created.




*Screenshot 864: A view of the recently created communities*

### Recommended communities

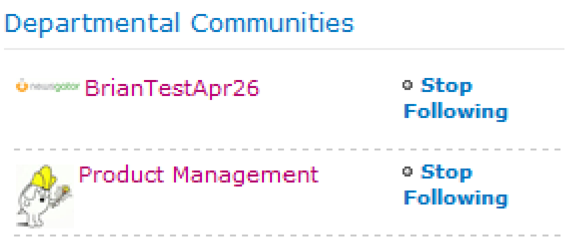
Recommends a single new community for the user to join, and lets the user choose to follow or ignore it.

Recommendations are derived from the most highly-followed discoverable communities that you're not already following. Popularity among your colleagues is considered first, and if this produces no recommendations, then popularity among all people is considered.


*Screenshot 865: Recommended communities view*

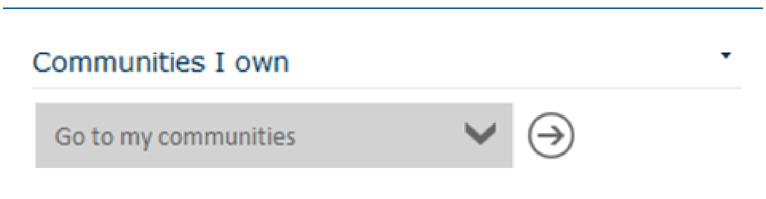
### Community discovery by tags

The admin configures it with a tag or tags; any communities tagged with a tag that matches will be listed in this web part.




### Communities I own

Shows communities for which you are the owner or moderator.




## 1.47.3 Community- based web parts

Below are the community- based web parts:

## Community activity feed

The Community Activity Feed web part functions quite similarly to the Activity Stream web part used on the My Newsfeed page.

## Posting

Adding Posts and asking questions works the same as in the Activity Stream web part, except that an @ target to the community is automatically added to the beginning of the entry once it is submitted.

If the Idea Stream module has been installed by your organization, there is additionally a **Post an Idea** option that creates an idea within the community.

## Finding items using preset filters

The **Show** dropdown of preset filters is limited to Newsfeed, Questions, Polls and Ideas.

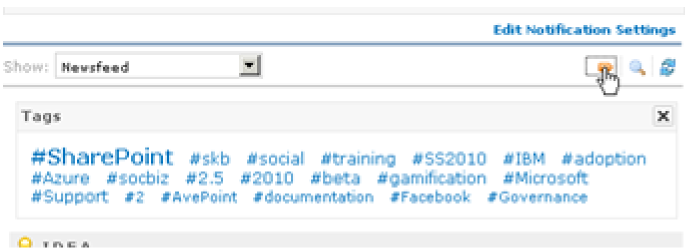
These are a bit different than the versions in the **Activity Stream** web part. **Newsfeed** shows public activity done in the community, and microblogging done within this web part or done elsewhere but targeted to the community.

The other three filters show only those questions, polls or ideas that have been targeted at the community or created within it.

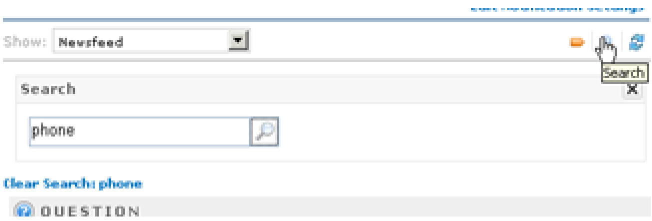

## Finding items using hashtag or keyword matching

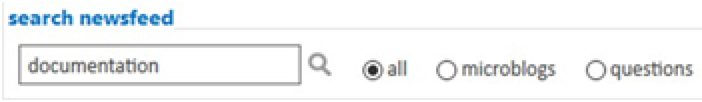
The hashtag control presents the top 20 hashtags within the community stream (tags from last 30 days).

Click any hashtag to filter the community stream down to items containing that hashtag, in the main entry or in any responses. You can also filter by clicking a hashtag within any item.




The search control allows filtering down to user posts within the community that contain the entered keyword, in the post or in any response to it.




> **Note:**
> As of the 5.5 release, the community activity stream search has options to only return microblogs or questions in the results.

## Pinning

Community owners may see an additional item in the **More** menu of items in the community stream called **Pin** or **Unpin**. **Pin** can be used to pin one or more activity stream items to the top of the community stream.


Pinned items get special styling so users understand why they do not move down the stream.



The item stays pinned to the top of the stream until it is **unpinned** from the **more** menu.

This is useful for highlighting items that you want to be sure all community members see.

Even though an 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.

## Missing options

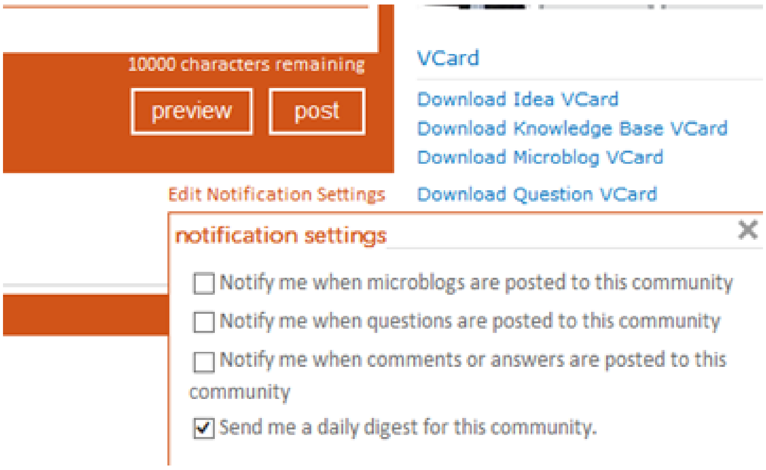
Actions that are personal in nature (like sending private messages or viewing notifications), or are otherwise not specific to the community (like managing spheres), are not available.

## Notification options

The only personalization you can do is to opt to be notified when people post to the community.

There are separate notification options for microblogs and for questions, available by clicking the **Edit Notification** Settings link below the **Post** button.

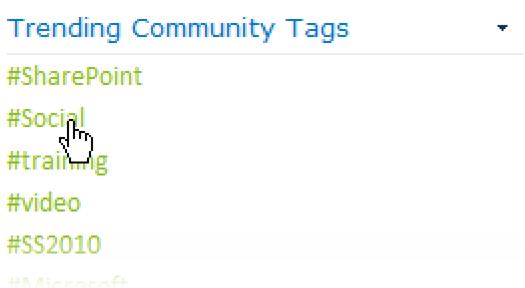
Options for notifications on comments and daily digest were added in the 4.x releases.




## Trending Community tags

While the activity stream web part and community activity stream web part each include a built-in tag cloud that shows the top 20 hashtags over the last 30 days, customers frequently want a way to show the top tags that are recent.

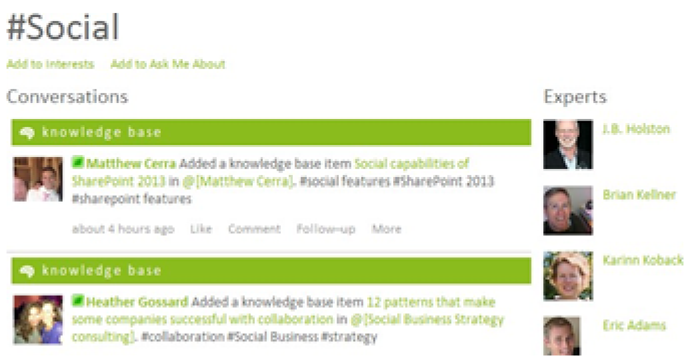
**Trending Community Tags** presents hashtags from the community that are popular within the last week, with a bias toward hashtags that are popular even more recently.




*Screenshot 866: Trending community tags*

When a user clicks on a tag in this web part, they go to tag page that shows the hashtag, the options to add that tag to the user's Interests or **Ask Me About** fields in their profile, and the community activity stream items containing that hashtag.

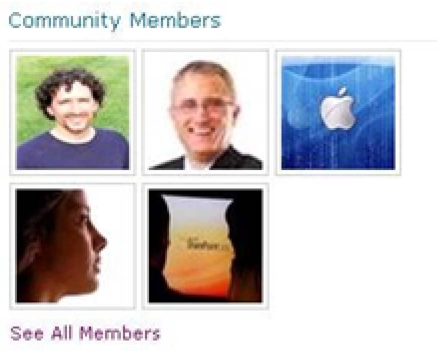
If the Spotlight module is installed, the user also sees the top scoring experts on that tag.




## Community members

This web part displays user profile pictures of the most active members of a given community.

This feature is useful for giving a “face” to the community that visitors will notice quickly when first arriving at the community site.




*Screenshot 867: Community members*

As of the 5.0 release, there is an option to show only owners (users who have full control access to the site).

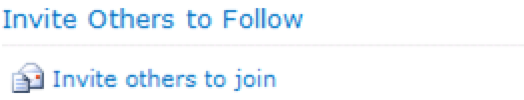
## Follow community

The Follow Community (formerly Join Community) web part allows users to begin or stop following the community, they are currently viewing, with a single click.



## Invite others to follow

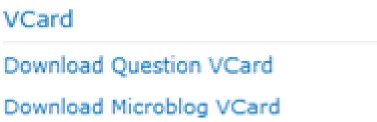
Allows a user to send email with a link to this community to make it easy for users to inform other users about the community. It is in the NewsGator Community web parts gallery.




### VCard

When placed on a community that has the inbound email feature turned on, provides members links to vcards with which they can add the community inbound email addresses to their contact lists.

This allows easy creation of new questions and microblogs by email.




### NewsGator keywords feature

When the NewsGator Keywords feature is activated in a community, the tabular list displays in the community (for Documents, Wikis, Tasks, etc.) gain a **Tags and Notes** column.

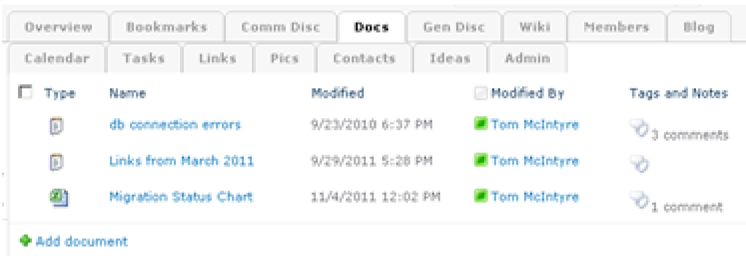
Clicking on the **tag and note** icon in this column brings up the control to view all the tags and comments on the item and to add more.

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 stream events for adding or editing list items automatically become notes on the list item.)

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.




### Social Article Activity Stream web part

This web part is only intended for use on SharePoint article publishing pages. Please see the v5.4 release notes for full details.

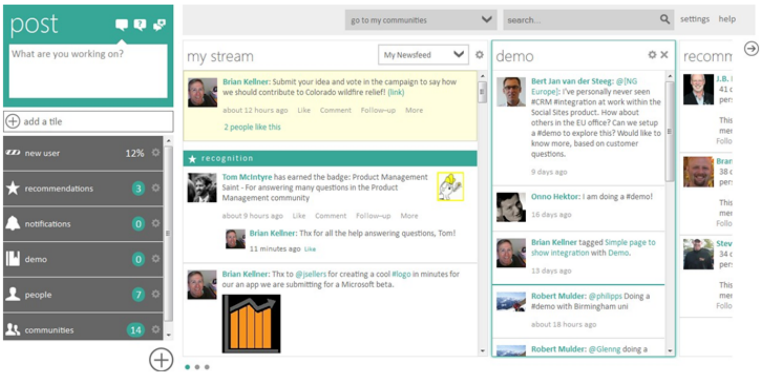
## 1.48 Lookout guide

### Lookout: A personalizable home page

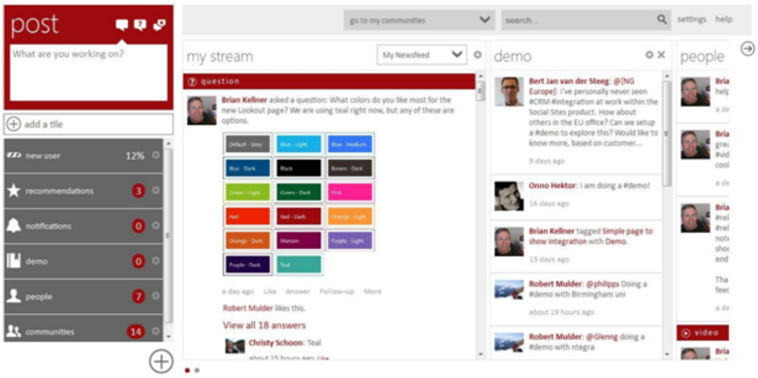
**Lookout** is a completely new personal page that gives users the ability to make the stream work the way they want. It is an optional capability.

Companies can continue to use the existing web parts by themselves or in conjunction with Lookout. Or they can use Lookout as the main starting page for end users.

Below is an example of this page after some personalization.




The highlight color for the Lookout page can be selected in Central Admin (see below). The screenshot below uses dark red instead of the teal in the previous view.




Lookout includes the ability to define personalized views of the activity stream called **tiles**. It also includes new user profile completion, a new recommendations capability, notifications display (which now consolidates notifications), navigation to your communities and spheres, a new unified search capability, enhanced settings controls, and a new user tour to show the key features.

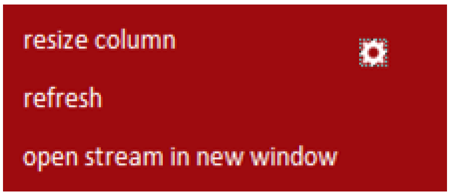
The information on the **Lookout** page is organized with a post box at the top left above a set of tiles which indicate counts of key items for the user.

To the right of this area, a top bar provides navigation to communities, search, setings control and a help link.

Below this bar, columns display views of the activity stream or data from the tiles. Columns can be either wide or narrow. In wide mode, each item in the activity stream is shown with controls (like, comment, follow-up, etc) and a view of comments and likes.

In the narrow mode, only the content of the stream item is shown. Clicking on the stream item in narrow mode opens up a full view of that item with all the controls.


Columns can be dragged left or right to re-order them (the **my stream** column is always the furthest left, but others can move). Columns can also be refreshed individually and detached along with re-sized from the ⚙ icon.



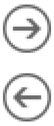

Click the ✕ in the upper-right corner of a column to closes it, but it can be opened again any time by clicking on the corresponding tile.

The **my stream** column, if it is opened, is always the leftmost column. If a column is not already opened when the user clicks on a tile, the column are opened immediately to the right of the **my stream** column if that is visible on the page.

If **my stream** is scrolled off to the left, the column is opened just to the right of the tiles. If a column is already open somewhere on the Lookout page but is not currently visible, the Lookout page scrolls left or right as necessary to show the column when the user clicks its tile.

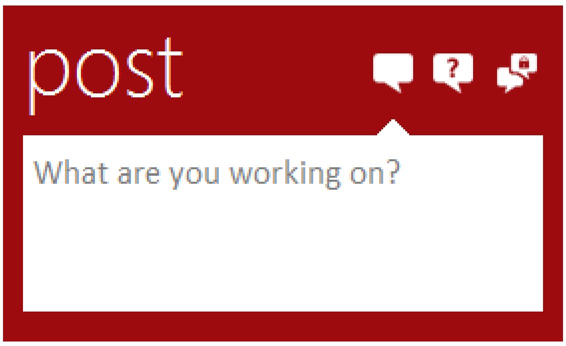
A set of dots at the bottom of the page show the number of open columns. Clicking on a dot scrolls the Lookout page until that column is displayed. The **my stream** column is always represented by the left-most dot.

When multiple columns are opened, the user can scroll left or right by clicking the arrows on the right side of the screen.

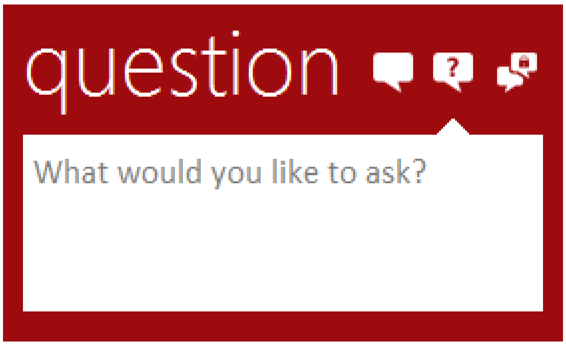


## 1.48.1 Post box

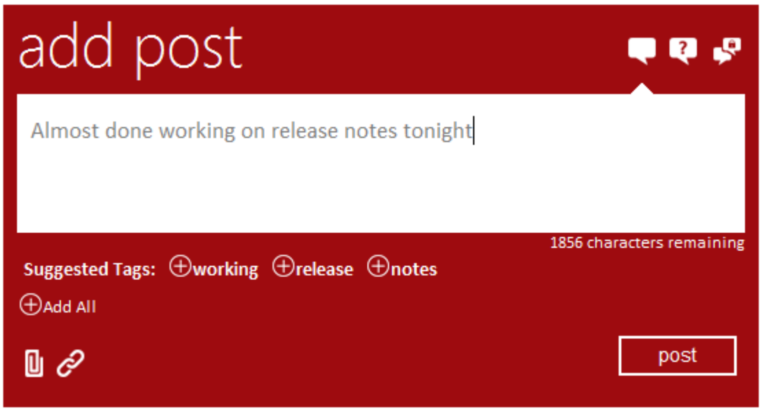
The post box starts in a collapsed state to save screen space.




Users can click the three icons above the box in either the collapsed or expanded state to choose to create a microblog post, a question or a private message.




When the user clicks inside the post box, it expands to give more room for entering text.




The post box has all the same functionality as the activity stream web part. File and link attachments can be done and hashtags are automatically recommended.

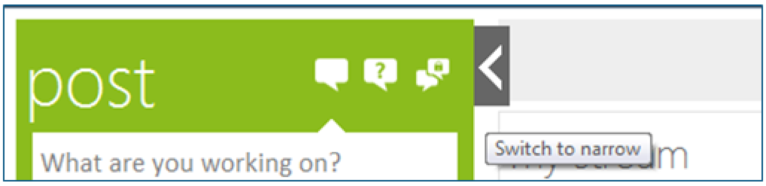
Links included in microblog posts and questions automatically try to retrieve a thumbnail image and a synopsis for that page (new feature in 3.0 – see below).

Similarly, creating a question provides the same options available in the activity stream web part including creating a poll.


When the user posts a microblog or question, the **my stream** column should refresh to display it if the display filter is set to a view that includes that item.

## 1.48.2 Narrow view of lookout tiles

To allow more columns to display on the screen, the column of tiles on the left-hand side of the Lookout page can be collapsed to a narrower form.




Clicking the  to the right of the post box causes the tiles to shrink in width, to only show the icon and the count:


*Screenshot 868: Only icon and count is shown*

Clicking the  arrow switches back to full tile width.

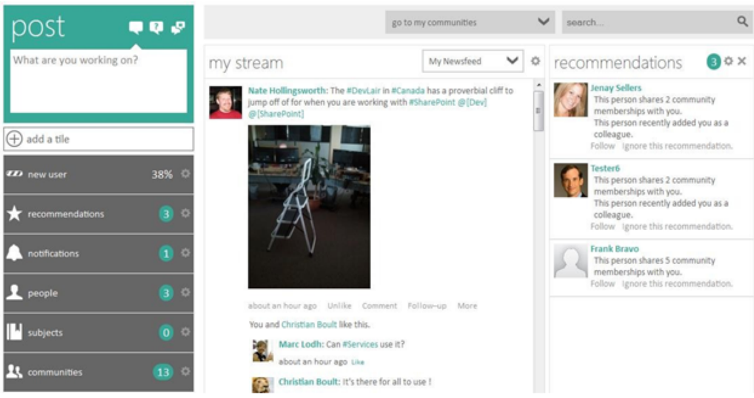
### 1.48.3 Tiles

Tiles are the gray boxes on the left side of the screen.

When a user first views Lookout, a few tiles are automatically displayed. Tiles always display an **unviewed count** on the right side. This represents the number of new items since the user has last clicked on the tile to display it as a column.

If a column is already open for a tile, that count is also shown in the top of the column. Clicking either the tile or the number at the top of the column resets the count to zero.

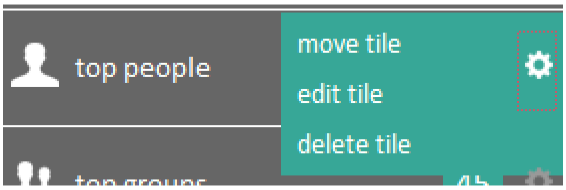
> **Note:**
>
> Based on usability testing, the word “tile” was replaced with “stream” in later releases to make it more user friendly. The notes and screenshots here still use the original “tile” terminology.




The **new user** tile shows how far the user has progressed in completing the profile steps (This information is carried over from the Getting Started web part. New users have 0% completion.) The **recommendations** tile includes recommended colleagues and communities.

The “notifications” tile shows the count of unviewed notifications. The “people”, “subjects” and “communities” tiles are example tiles that are created automatically based on Aurea Social analyzing the user’s prior behavior. These tiles have the names of people, hashtags or communities pre-set as examples for users.

Existing tiles can be moved, edited, or deleted by clicking on the right side.



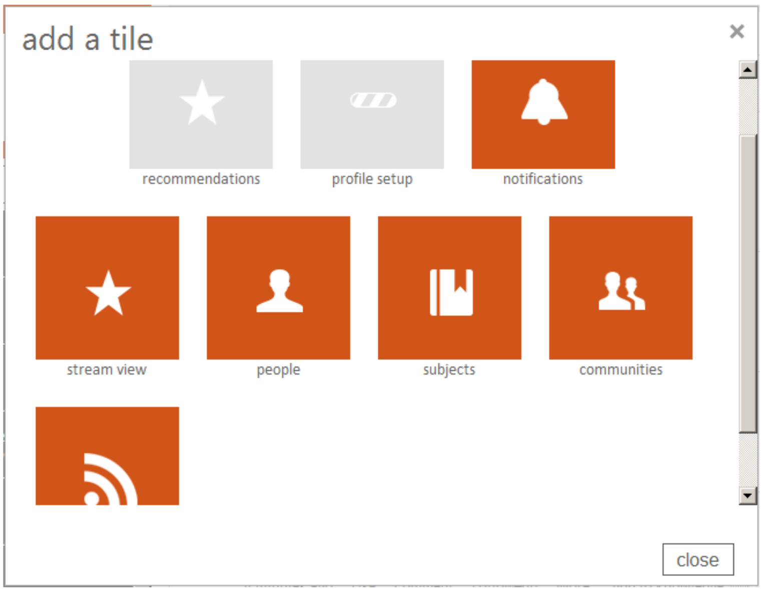

*Screenshot 869: Click to edit or delete tiles*

**Move** lets the user drag the tile up or down in order. **Edit** gives the user access to change the name of the tile, the icon it displays, and the criteria for the contents that the tile’s column displays.

Click **delete** to remove the tile permanently (but the user can re-create any tile if needed).

Click to bring up a dialog to choose a type of tile.


The first step is to choose a type of tile:



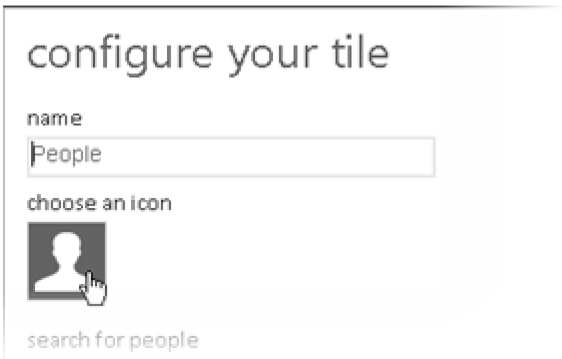

*Screenshot 870: add a title*

When one of these choices is clicked, the new tile of the type clicked shows in the left column. The user then sees a configuration screen that is specific to that type of tile (if applicable).

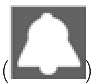
After saving their choices on the edit screen, the tile's column is automatically displayed to the right of the **my stream** column.

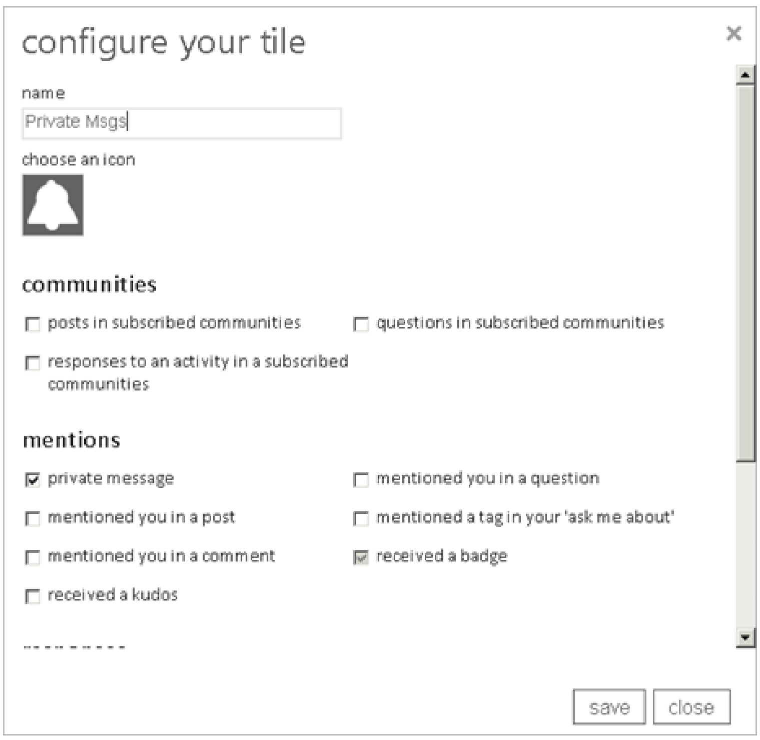
A person can only have one **new user** and one **recommendations**" tile visible, so these choices are unavailable if the user already has those tiles visible.

Regardless of the type of tile, the configuration screen for a tile always begins with options to edit the name and the icon displayed on the tile.




Clicking on the display of the current icon selection expands a chart containing a variety of other icon options. Click an icon from the chart to change the tile's icon. This icon also displays on the **Lookout360** bar (if deployed).


Clicking the "notifications" tile ()adds a new tile and allows these configuration choices.



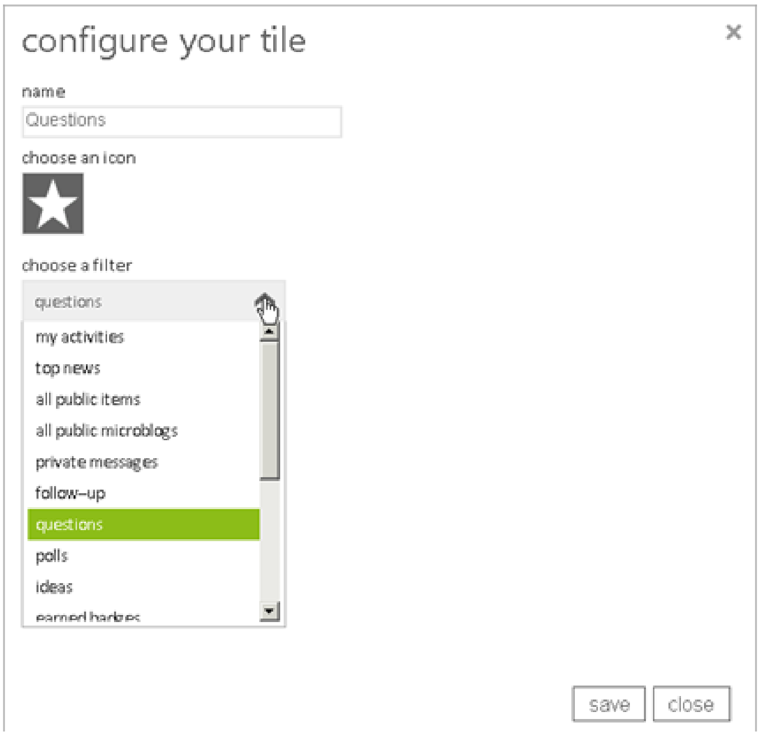

*Screenshot 871: Configure your tile*

In the example above, the tile is going to just display notifications from private messages. Note that in this case, the user has chosen not to receive any badge notifications, so the option to add that to the tile is suppressed.

Also, the top choices in the **communities** section allow the user to have tiles show notifications from key communities.

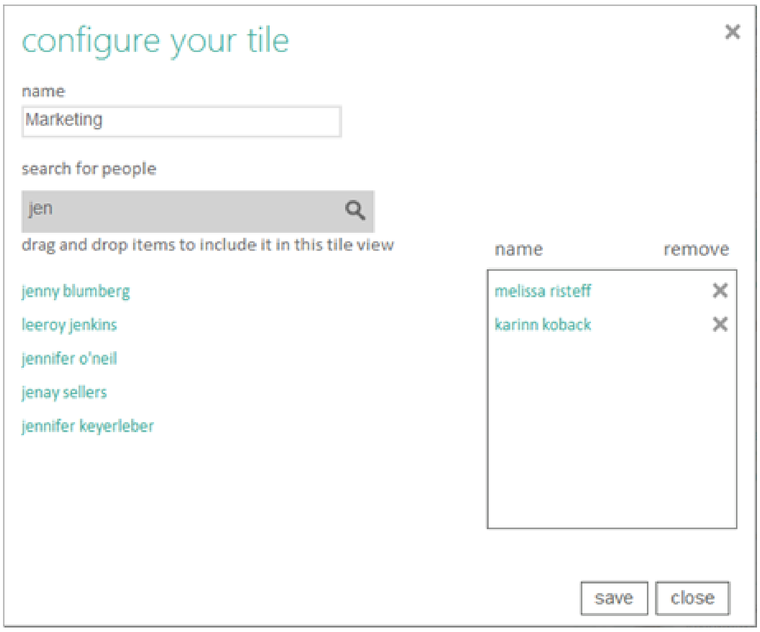
The user chooses which communities she wants to get notifications from in the "settings" screen. Selecting these checkboxes causes those notifications to show in the tile.

Click on the **stream view** option on the **add tile** screen lets the user choose one of the standard activity stream filters.

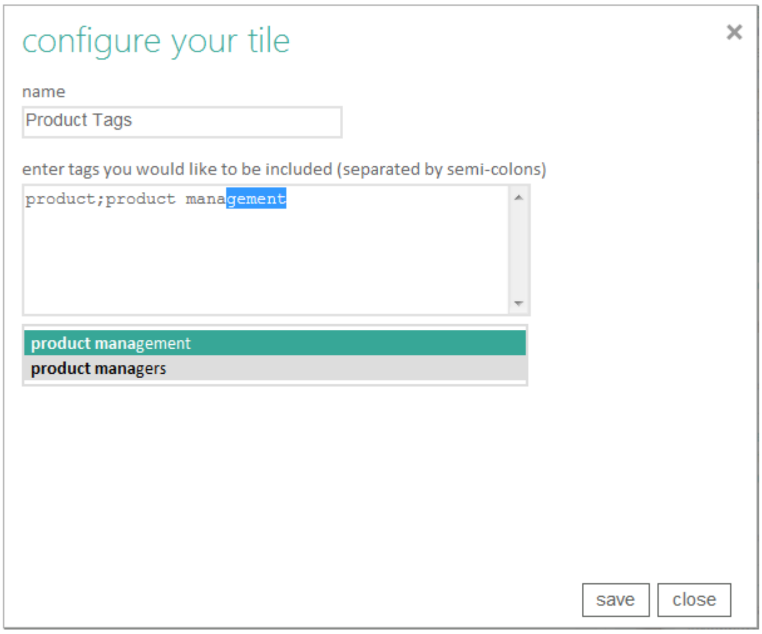



In this example, a tile is being added to keep track of questions in the activity stream.

Clicking the **people** option gives you an edit screen where you can search by name and drag and drop people into your list. The list may include a few people automatically selected based on Aurea Social behavior analysis.

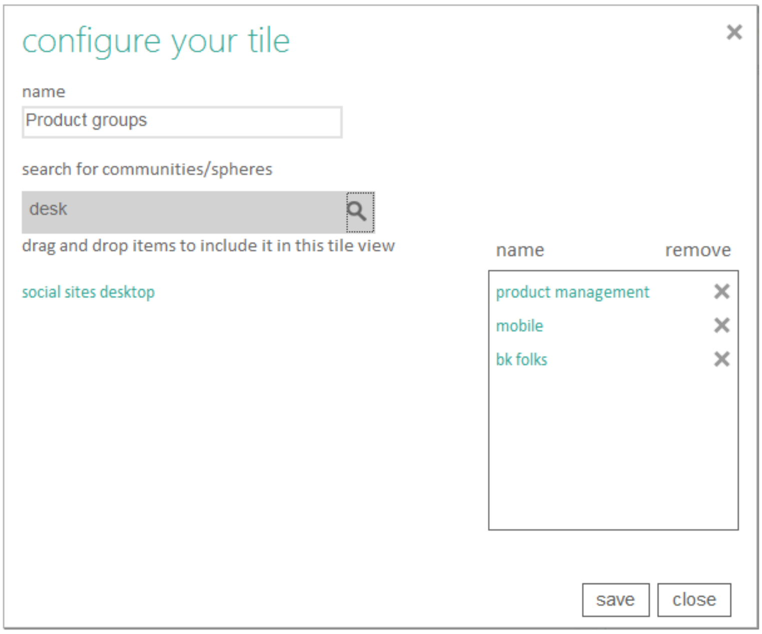



Click the "subjects" option to allow the user to enter in tags.




Any microblogs or questions that contain that hashtag is displayed by this tile. (Similar to people tiles above and community tiles below, Aurea Social may pre-select a few tags based on analysis of behavior. If you don't want any of these, just delete them from the box.)

Adding a new "communities" tile lets the user search for communities and spheres.



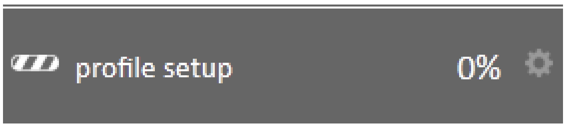

In this example, several communities and spheres that cover product teams and products are being combined into a single view.

Click the **Subscription** option (bottom option in above picture, partly scrolled out of view) to add a tile for News Stream content.

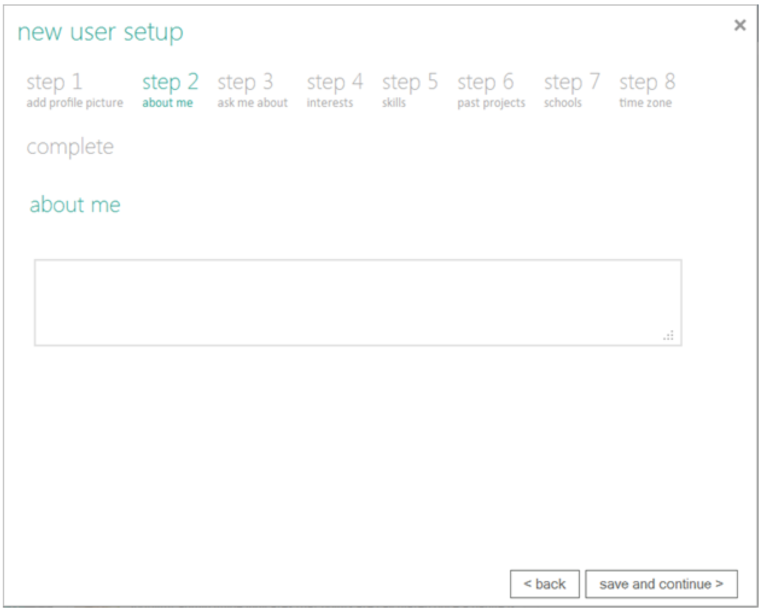
For more information on setting up this type of tile, see the Aurea Social News Stream section of this guide.

## 1.48.4 Profile setup

The **profile setup** tile is one of the default tiles included for every user. The tile shows a percent-completed number.




Clicking the tile brings up a screen like the one shown below.




*Screenshot 872:* ***new user setup*** *screen*

The user is automatically brought to the furthest completed step. The list of steps is consistent with the list of steps that were displayed in the profile completion portion of the **Getting Started** web part (Administrators can choose steps to skip by editing the Getting Started web part settings – the skipped steps applies in both places.)

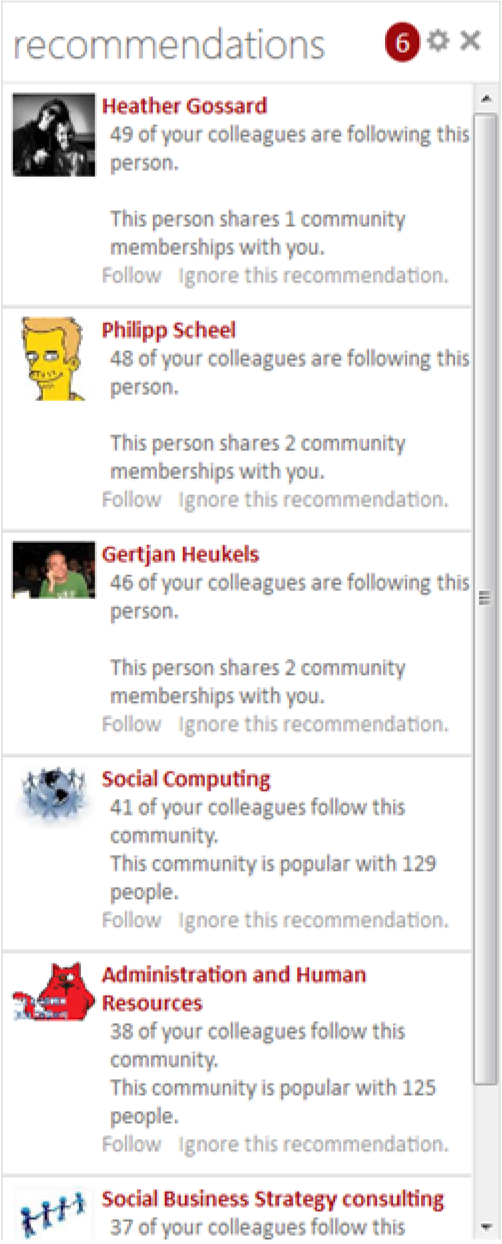
In this interface, all steps are required and have validation (except uploading the profile picture and setting time zone). Progress through steps is tracked and viewable on the reporting page.

When a user completes the final step, a button to start the welcome tour is displayed.

### 1.48.5 Recommendations

The **recommendations** tile offers suggested people and communities to follow.

It tries to find three eligible recommended colleagues and three recommended communities each time the user refreshes it.




*Screenshot 873: Recommendations*

Each recommendation includes the underlying reason(s) that the recommendation was made.

The recommendations algorithm randomizes the suggestions to avoid presenting the same options all the time.

## 1.48.6 Email, calendar and task tiles

So that users who like to work with the Lookout interface may manage more of their key information from within this interface, users have the ability to add tiles for email, calendar and tasks.

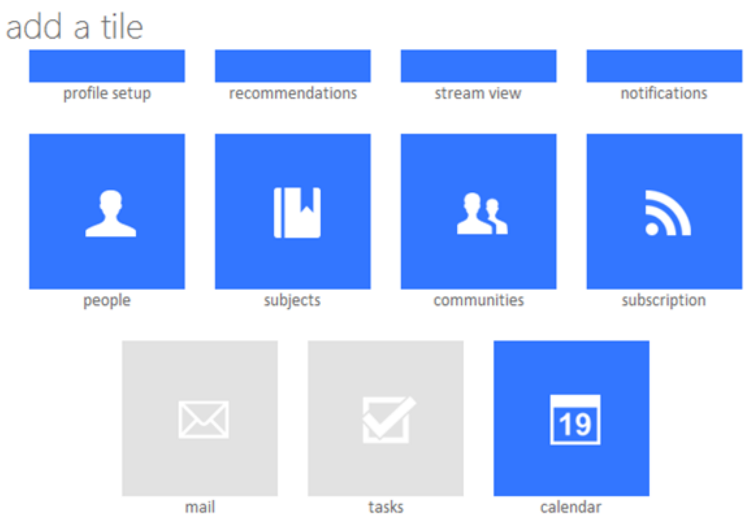
This is an optional capability which must be enabled in Central Administration before the tiles are available to be added, and to function properly requires the admin to do additional configuration so that Aurea Social can connect with Exchange.

For further details on how to configure this, see the Exchange Settings section of the Aurea Social Administration Guide.

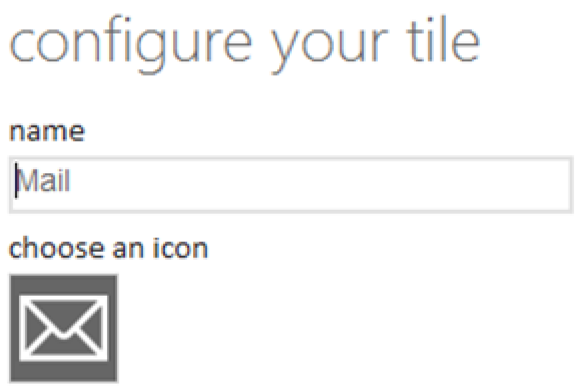
When enabled, the **Add Tile** dialog includes tile type options for **Email**, **Calendar** and **Tasks**.

> **Note:**
> After you have added the Email and Task types of tiles, you cannot add a second tile of that type.

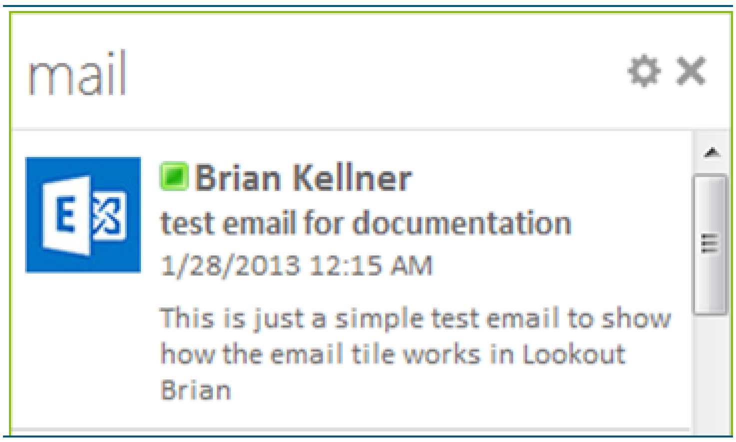
Calendar tiles have two options, and you can add more than one of this type of tile.



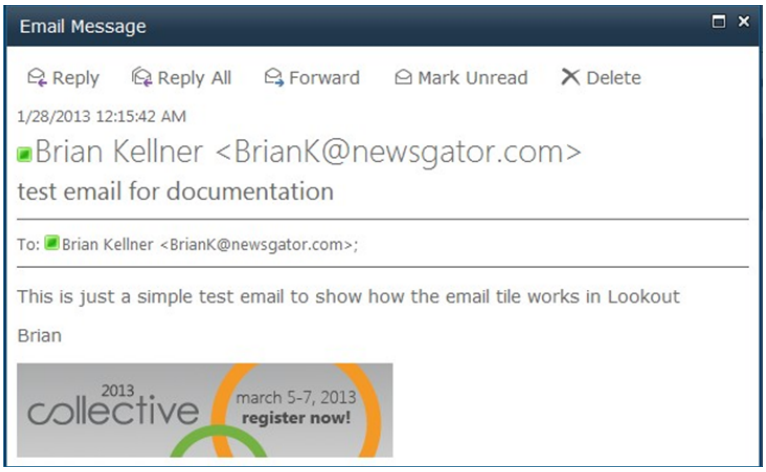

The Mail tile only has title and icon options on the edit screen.




When viewed in the column, unread emails have a bold title.

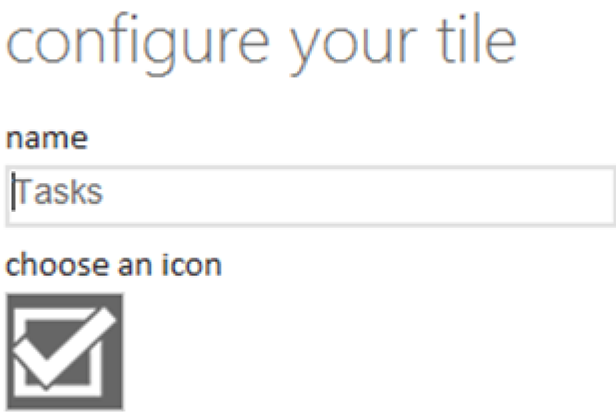



Clicking on the item in the column opens up a window where you can view and interact with the email.

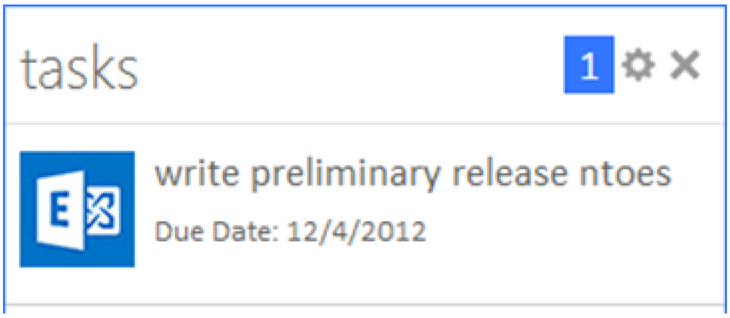



The mail tile only shows the 25 most recent emails. It is very valuable for monitoring emails throughout the day, but isn't designed to fully replace a full email client.

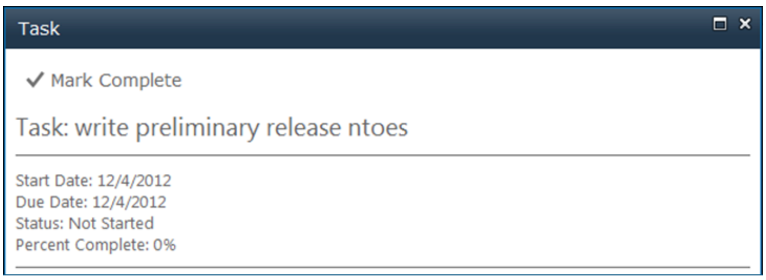
The **Mail** tile only has title and icon options on the edit screen.




The task column in Lookout shows the current tasks that need to be completed.

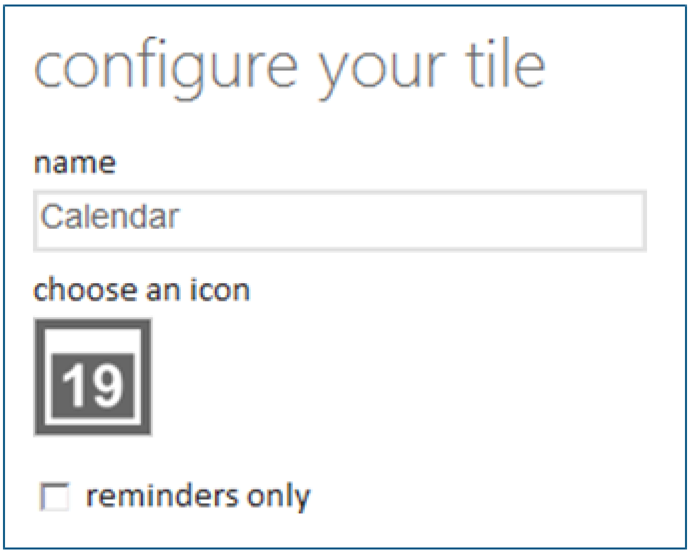



Clicking on the item in the column shows a detail view of the task with the option to mark it complete.

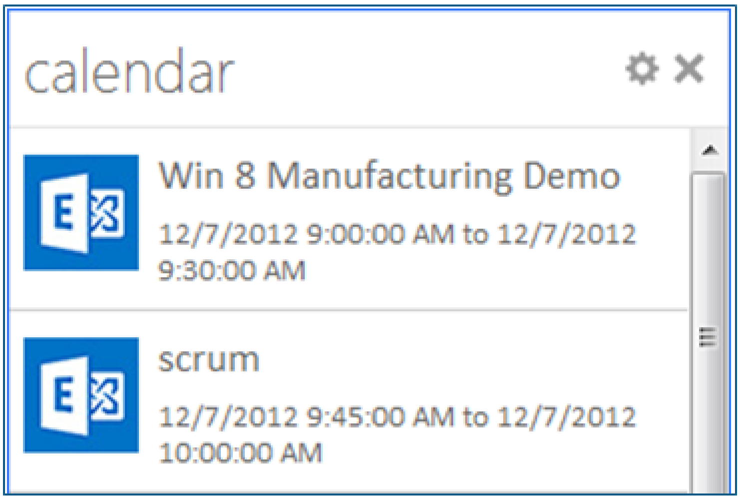



Items flagged in email are considered "to do" items and do not show up as tasks.

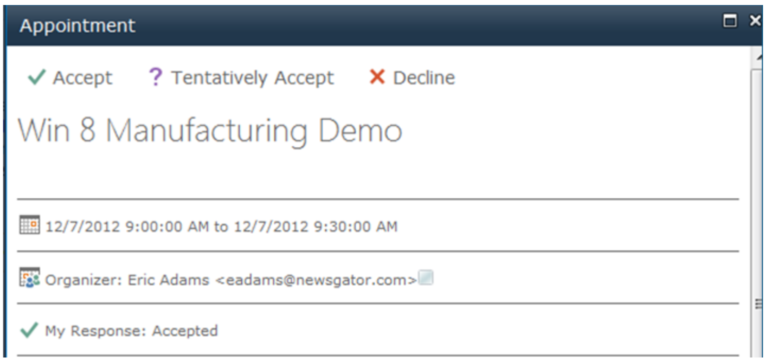
The Calendar tile has an option to show all events or reminders only.




When displaying all events, the listing shows a view like this.




Click on a particular event to show a details view with controls.




## 1.48.7 Notifications

The **notifications** tile shows the number of unviewed notifications.

As mentioned in the section on adding tiles, notification tiles can be set to monitor and display only certain types of notifications or a user can have a single notification tile for all notifications.

The count on the tile indicates the number of new activity stream items that have notifications. This is a change in behavior from prior versions of Aurea Social.

> **Note:**
> This change is only implemented on the Lookout page. The count shown in the Activity Stream web part still follows the prior logic.

Here is an example where three new items have been added to the stream and several people have responded.

1. Amy asked a question

a. Bob answered the question

b. Fred liked the question

c. Sue also answered the question

2. Amy made a microblog post

a. Sue liked it

b. Bob liked it

3. Fred sent Amy a private message

If Amy looked at the **Activity Stream** web part, she would see six notifications (one for each of these actions). When Amy checks the Lookout notifications tile, she sees an unviewed count of three because there are three activity stream items that had activity on them.

When Amy opens the notifications column, she will see the last notification for each stream item ordered by most recent first. So if all the actions happened in the order listed above (starting with 1, then 1a, then 1b, etc),

Amy will see these notifications listed in the below order:

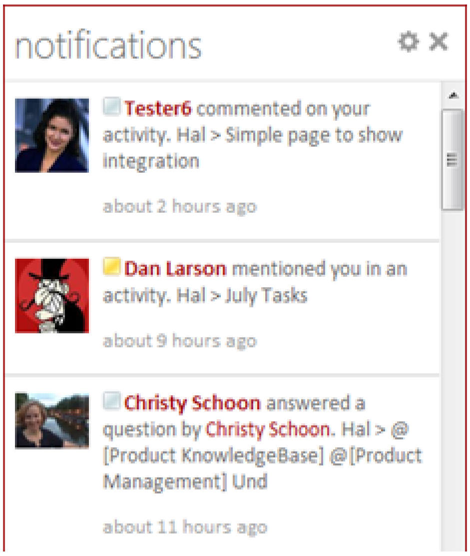
```
Fred sent you a private message
```

```
Bob liked your microblog post
```

```
Sue answered your question
```

The actual display looks like the example screenshot below.

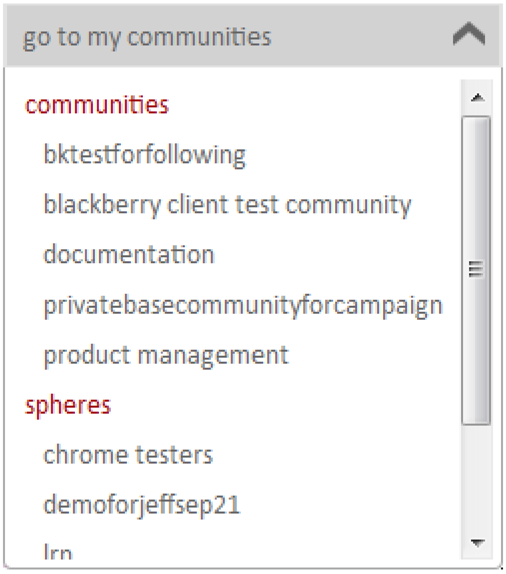
Clicking on an item opens a display, so Amy can see all the interactions as well as the full content of the activity stream item.



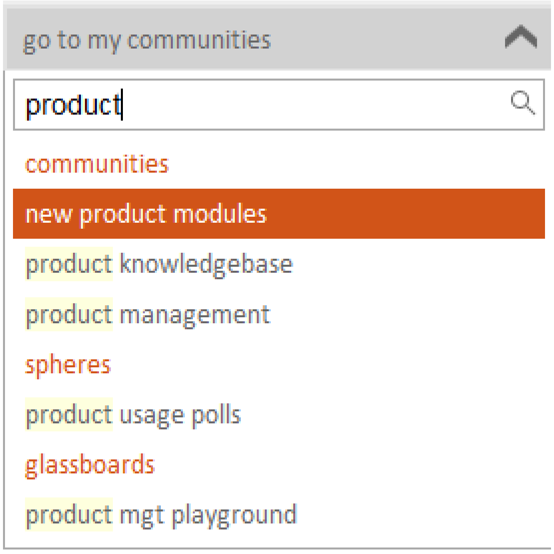

## 1.48.8 Community, Sphere and Glassboard navigation

The pull-down control at the top of the screen provides quick navigation to the user's communities, spheres and glassboards (if these are being used).

The list is organized alphabetically and grouped into these sections.




Selecting one of the options causes a new browser tab to open to display the community, sphere or glassboard view.




You can type characters in the search box at the top of the list to filter the choices presented.

### 1.48.9 Search

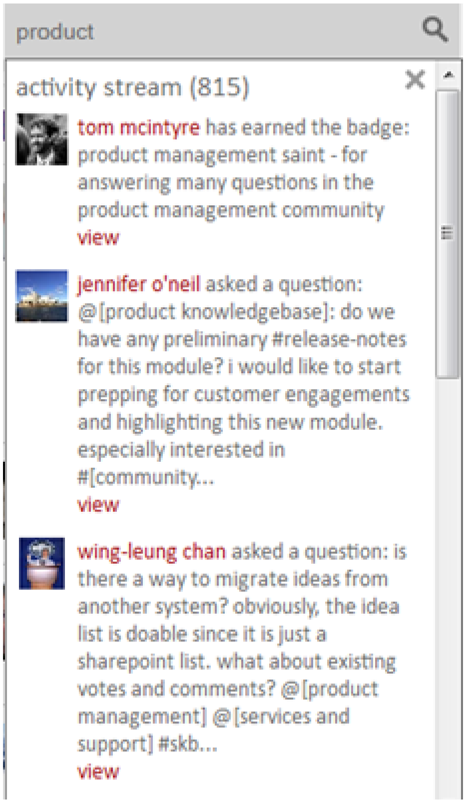
A new unified search option is also show at the top of the screen. The search looks for the top three matches in activity stream results, communities, documents and people.

The activity stream search and community search use Aurea Social search capabilities. Document search and people search leverage SharePoint's search capabilities. The screenshots on the following page show example results.

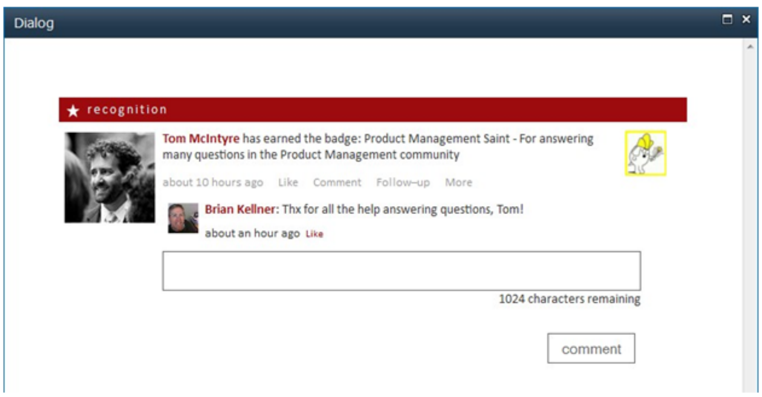
For each of the types of results, a count of the total number of matches is shown. This is also a link that provides the user with a way to get more than the top three results.

For activity stream items and communities, clicking this link takes the user to new search pages that show the full results.

For documents and people, clicking these links takes the user to the SharePoint search center to allow them to search for more results (see admin section below for configuration).




Each type of search result includes some options for taking action. For **Activity Stream** items, the view link displays the new view page to let the user interact with the item.



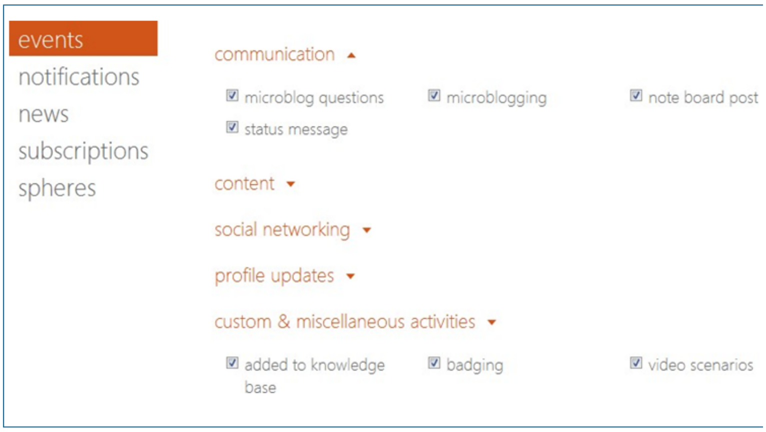

For communities and spheres, the name is a link that takes the user to that community or sphere.

Document results link directly to the file, and people results shows the mini-profile as well as take the user to that person's profile page by clicking on their name.

## 1.48.10 Settings

All the settings for controlling the stream experience and notifications are grouped under the "settings" link.

Clicking that link opens a dialog like the one below.

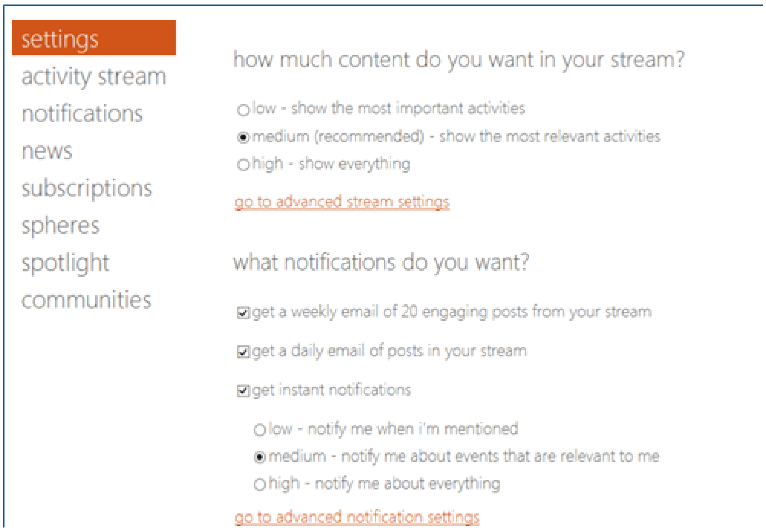



The screen defaults to opening on the **events** section. Here the user decides what kinds of activities she wants to see in her stream.

> **Note:**
> This is the same functionality seen when a user chooses to edit her SharePoint profile.

This screen provides a friendlier way of showing all the different kinds of stream event types by grouping them into logical categories.

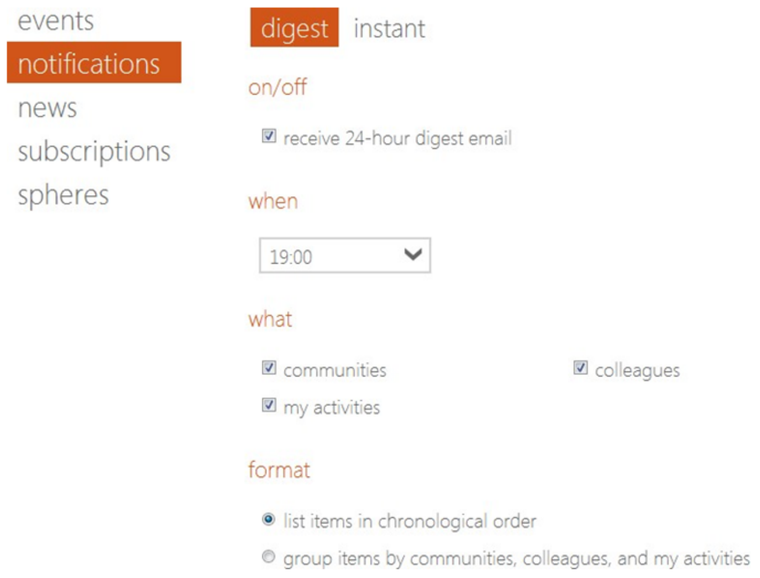
> **Note:**
> As of the 5.1 release, the starting screen has been changed to simplify it and put the most common stream and notification settings on a single page.




Click on **notifications** on the left of this dialog to show two major sections:

» digest

» instant



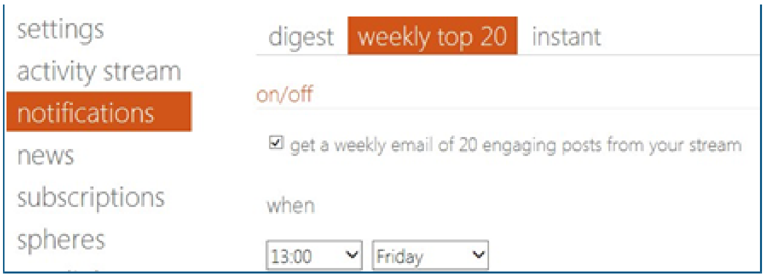

The default first view is for configuring the digest email. In the digest content settings, users first choose whether to receive a digest or not. Secondly, they can choose when to receive the email (based on their local time zone setting).

The third choice is the scope of data to include. Choosing to include community items gives you all your updates from communities (but you can choose to disable any specific community from your activity stream).

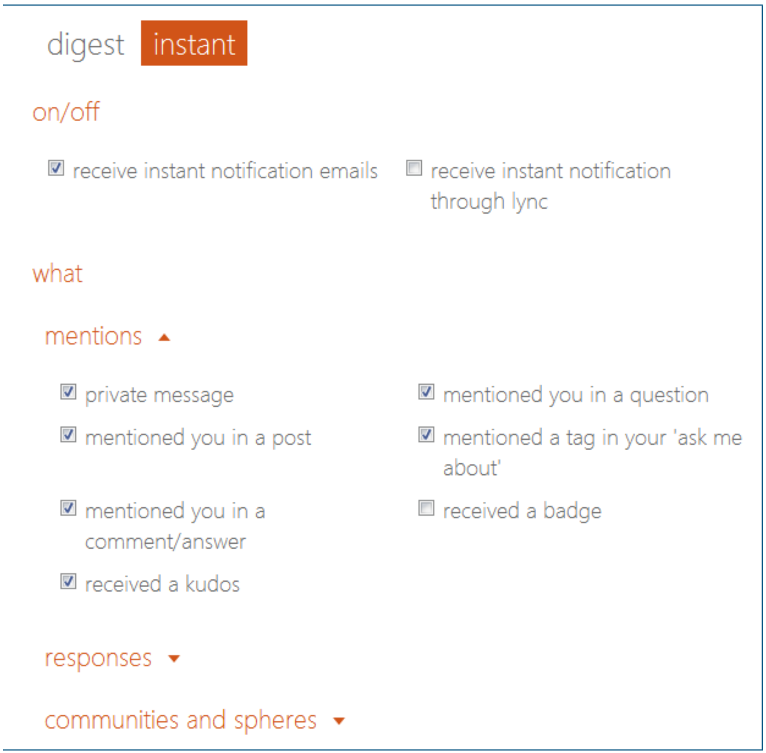
Checking the colleagues box includes events from colleagues (with the same ability to turn off receiving from any one person in the stream. The **my activities** checkbox lets you see the items you created or commented on.

Finally, users can choose one of two format options. Choosing chronological order shows each item based on time. Grouping is much like the format used in prior versions.

> **Note:**
> As of the 5.0 release, the notifications page has an additional tab to let the user enable and configure the weekly "top 20" digest email.



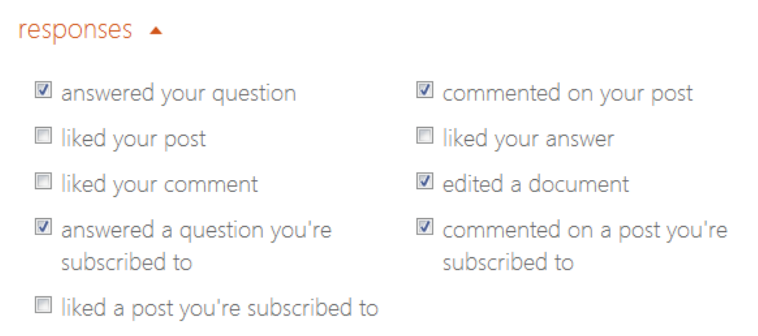

The **instant** section is organized similarly with on/off and content choices. Note: As of the 5.1 release, the Lync notification integration is no longer supported.




In the **what** section, users can choose to enable or disable notifications for any individual notification condition.

**Mentions** tend to be high priority notifications because they represent items where someone is specifically talking about the user (or are asking a question on a subject the user has explicitly said they are willing to help with.)

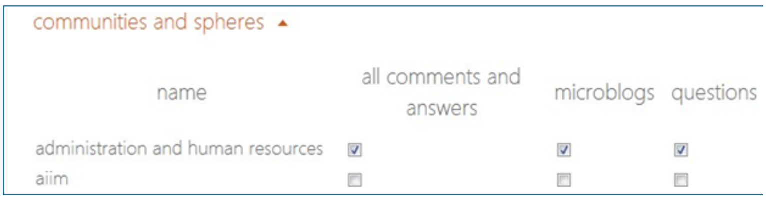
The **responses** section includes notifications that come from other users who are reacting to something done by this user, but are not specifically mentioning that user's name.




A user can choose to enable or disable each of these types of notifications. Note that if a user disables a type of notification here, that type is not available to include in a notification tile.

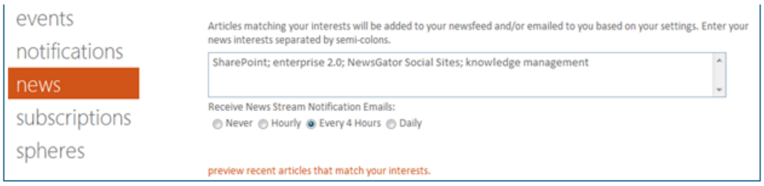
The **communities and spheres** section provides choices for each community or sphere the user is following. Users can choose to be notified of every new microblog or question sent to a particular community.

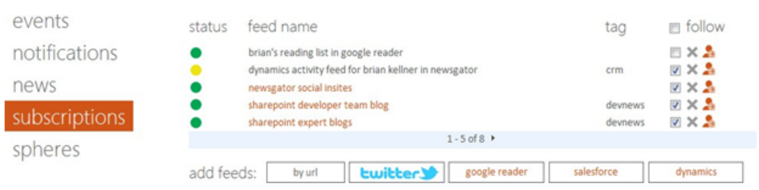
Users can also choose to be notified of every new comment or answer that is made to activity stream items from that community.



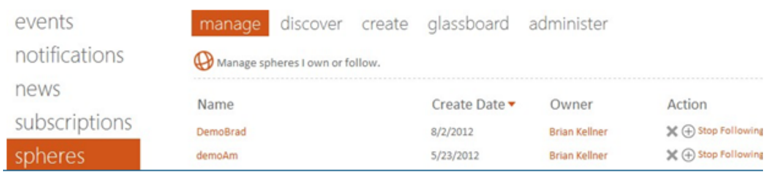

Users can still choose to enable or disable notifications for individual communities from the **edit notification settings** link on the community activity stream web part.

The **news** and **subscriptions** links provide control of settings for News Stream functionality.



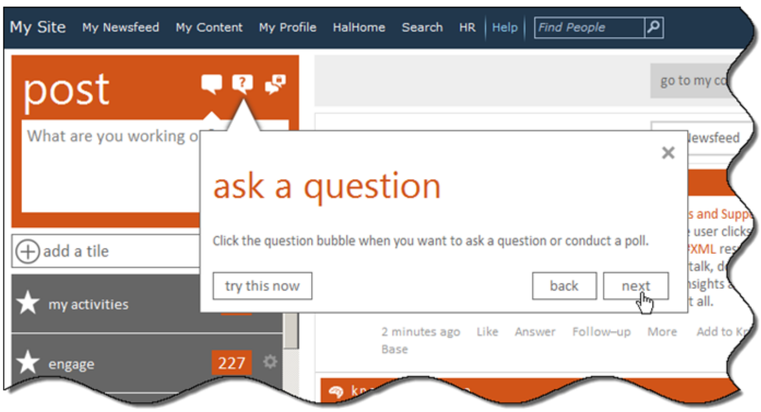




The **spheres** link provides access to capabilities around creating and managing spheres.




## 1.48.11 Tour

The **tour** link launches a tour that visually walks users through the key functionality of the Lookout page.



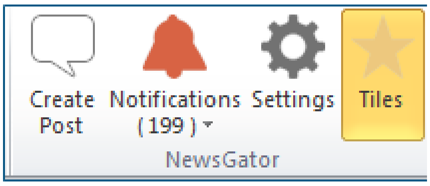

At any point during the tour, the user can click the **Try this now** button (or the ✕ icon) to suspend the tour and try what they have seen.

When they return to the tour by again clicking the **tour** link, they come back to the same place where they left off.

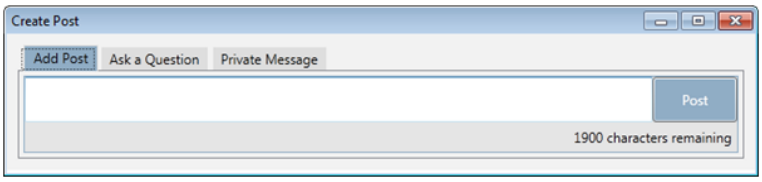
# 1.49 Outlook Plugin

Outlook is the dominant user interface for a significant number of users in many organizations.

To let these users more easily participate in Aurea Social, the Outlook Plugin provides several key capabilities. Once installed, the user selects settings to put in the URL of the SharePoint server where Aurea Social is running and choose login options.



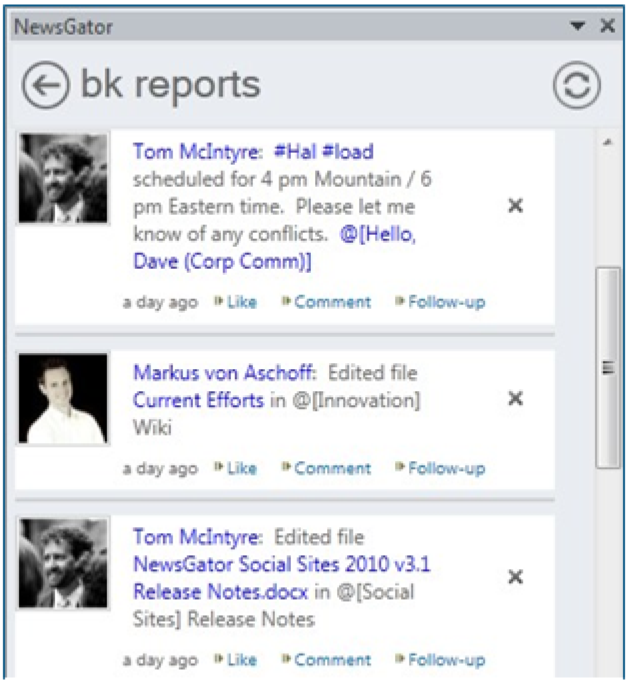

The plugin can be run with only these icons visible in the ribbon. Clicking the Create Post icon lets a user compose a microblog, question or private message and send it.




The notifications button shows the count of current notifications. It will show the count from your notification tile in Lookout if you have one configured.

Otherwise, it shows the count from the activity stream web part (which tends to be larger). Clicking the **Tiles** icon opens or closes the side panel to show the tiles you have defined in Lookout.


Tiles like new user setup, recommendations, **Exchange** tiles (see below) and external server tiles are not included in the list. The rest of your tiles should display. Clicking one of these tiles displays the activity stream events and allows you to like, comment and mark items for follow-up.




> **Note:**
> The Outlook plugin must have a connection with the SharePoint server running Aurea Social to display items. If a user clicks on a tile when there is no connection, an error message will display.

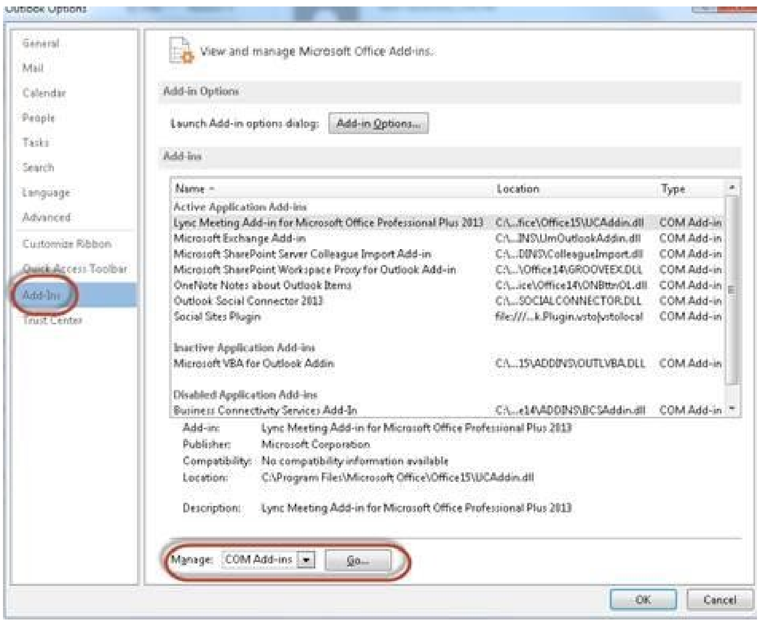
The Outlook plugin is designed to work in either Outlook 2010 or 2013. Note that on Outlook 2013, there have been cases where COM cannot be enabled.

To correct this, the user needs to have Visual Studio 2010 Tools for Office Runtime installed: https://www.microsoft.com/en-us/downloa

If the plugin is not enabled because Outlook 2013 is not enabling COM, follow these steps:

1. Go to **File > Options**.

2. Option window loads. Select **Add-Ins**. At bottom of screen, select **Go** after ensuring dropdown states **Com Add-Ins**.



3. New dialog appears. Check the box next to **Social Sites Plugin** followed by the **<OK>** button.

4. You might need to close Outlook and restart.

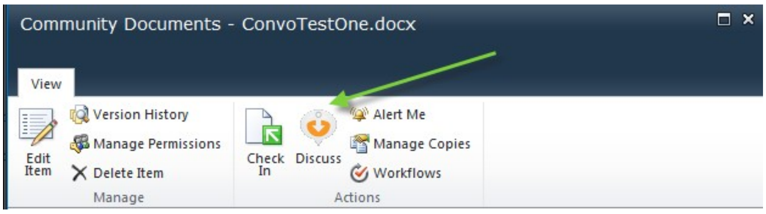
## 1.50 Conversations on documents and objects

Frequently users would like to have a conversation around a particular document or some other object (a web page, a customer record, etc). While SharePoint notes can be used to hold simple comments, they do not provide the richness of a Aurea Social stream and they are not easily visible.

This feature creates the ability to have a stream about anything. It includes built-in capabilities for document libraries, Office Web Apps, and web pages.

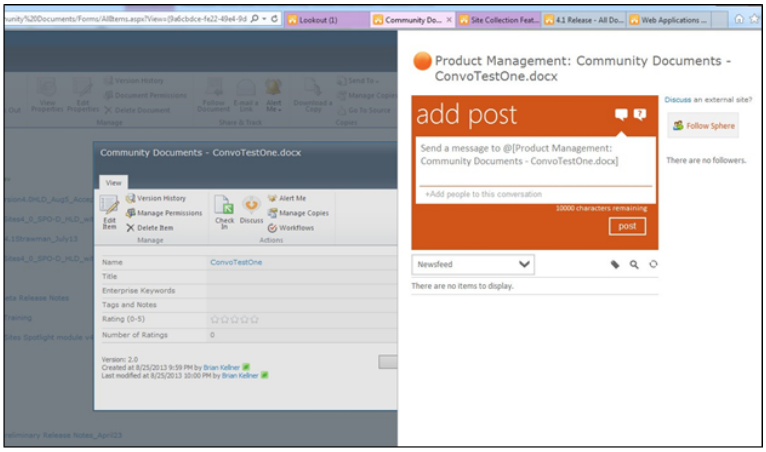
A plugin for Microsoft Office is available to provide these abilities from within an Office document.

After the NewsGator Item-Level Discussion feature is activated on a web app within SharePoint, viewing or edting document properties will display a Discuss option.




*Screenshot 874: Discuss option displayed*

Clicking the **Discuss** button opens up a discussion panel and grays out the rest of the screen.

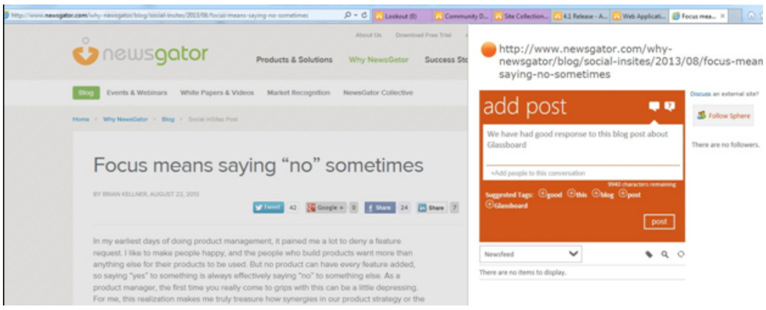



*Screenshot 875: Discussion panel is opened*

Posting in the box on this page creates a microblog which is tied to this document. The stream has typical controls including the ability to add comments.

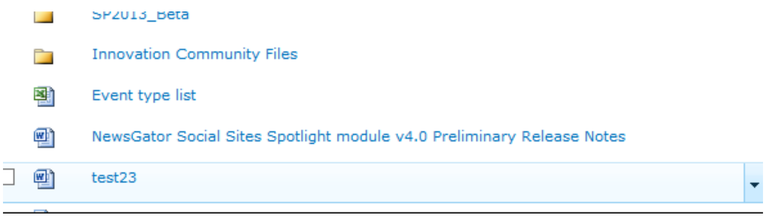
> **Note:**
> You can follow the conversation around the document (follow sphere) and see who is following it. If the document is public, your posts and comments on it will be visible to your colleagues.

Also, the **discuss an external site** link gives access to a bookmark control that lets you have a conversation around any web page.

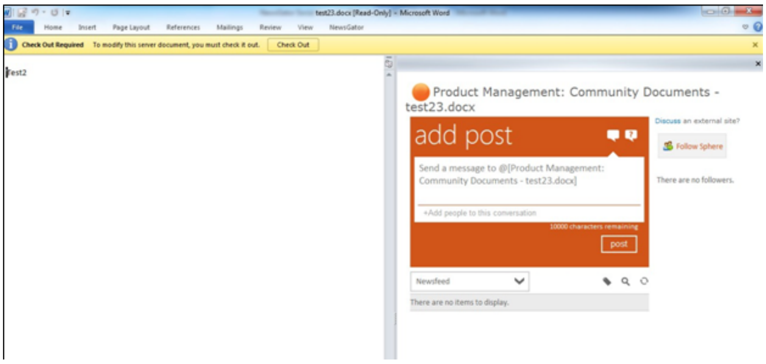



If Office Web apps is installed, the control to begin or access the discussion looks like this.


A Microsoft Office plugin is also included with this feature. If you have the plugin installed, it will automatically open a conversation pane in Word, Excel or Powerpoint when you open a file from SharePoint.

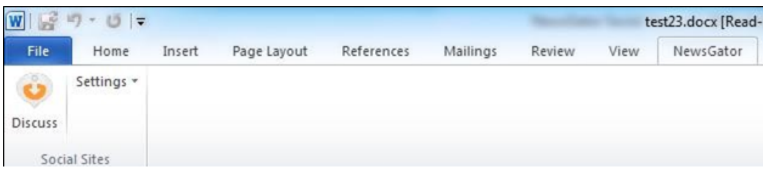



Clicking on this test document opens up Word with a split view as shown on the next page.

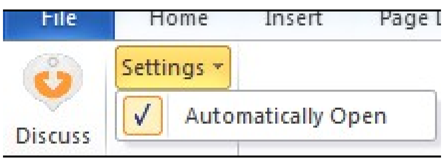



The left side shows the document content, and the right side shows a sphere generated specifically for this document. Users can choose to follow or post here just as they could from the web interface.

When the plugin is installed, a NewsGator tab is added to the ribbon. Selecting this tab shows two options.




The **Discuss** button opens the discussion panel if it is not already open. The **settings** option currently only has one choice.



If a user does not want the discussion panel to automatically open when loading a document from SharePoint, they just de-select this option.

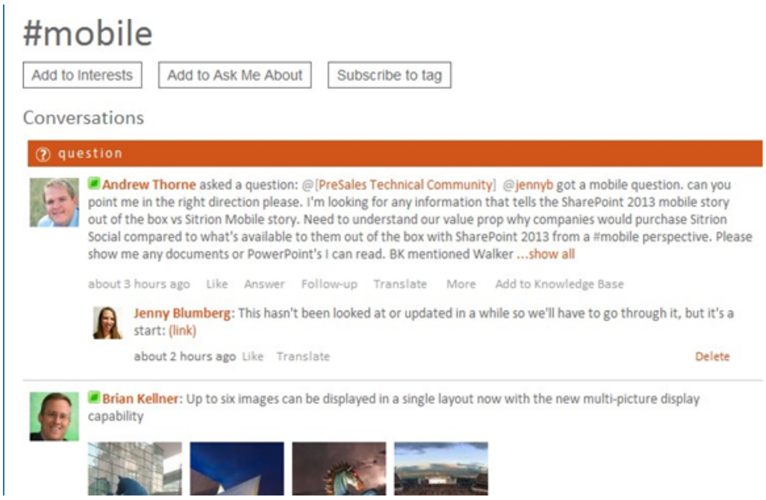
The Microsoft Office plugin works on Office versions 2003 and later.

> **Note:**
> In the 5.3 GA release, there is a known issue where the document link and community link can incorrectly get combined into a single link in the community activity stream for document conversation posts. This link will fail.

## 1.51 Hashtag-centric pages

In many cases, clicking on a hashtag that is visible in a Aurea Social web part will open a new page that is dedicated to that hashtag.

As demonstrated in the example pictured below, the main portion of the page prominently identifies the hashtag, contains some options for the user, and has a view of posts that contain that tag.

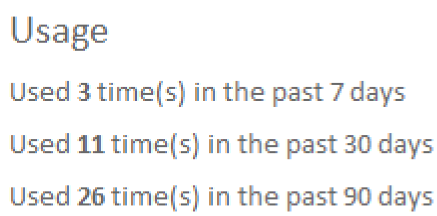



*Screenshot 876: A hash centric page*

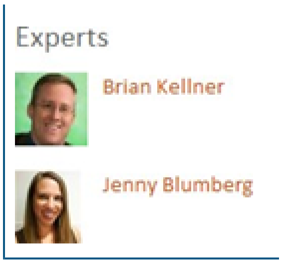
In this case, the user can choose to add this to their "interests" or "ask me about" portions of their profile which causes posts and questions containing the hashtag to show up in their activity stream.

Clicking the **subscribe to tag** button causes the user to be notified whenever the hashtag is used (for any post that the user could see).

The righthand side of the page shows statistics on usage of the hashtag.




If Spotlight is installed, people who score well on authority for this hashtag are shown in a column on the right.




### Accessing this page

One way anyone can access this page is by clicking any hashtag displayed in the **Trending Tags** web part.

Also, if your organization has opted for it (via an option setting in SharePoint Central Administration), clicking a hashtag in any activity stream view brings up this page (instead of causing inline filtering of the stream based on the hashtag).

## 1.52 Using notifications

Aurea Social generates three different kinds of emails to help keep users informed of important events and messages, and to allow immediate action on these by the user.

In fact, many users experience Aurea Social as much through email as by the web interface. They are a helpful way to keep up with the activity stream when you don't have access to a browser or mobile client.

The three types of emails Aurea Social generates are daily digest emails, weekly "top 20" digest emails, and instant notification emails.

In addition, all instant notifications can be viewed from the **Activity Stream** web part, regardless of whether or not the user has opted to receive instant notifications by email.

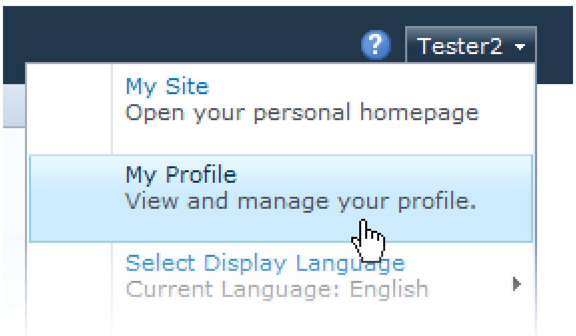
### 1.52.1 Setting the Time Zone used to display post times in emails

If you have not set your time zone in your SharePoint user profile, the times displayed on all posts and comments in the notification emails that you receive (whether digest or instant) will display using GMT as the time zone.

This could leave you with the wrong idea of when the posts, comments, or answers were made.

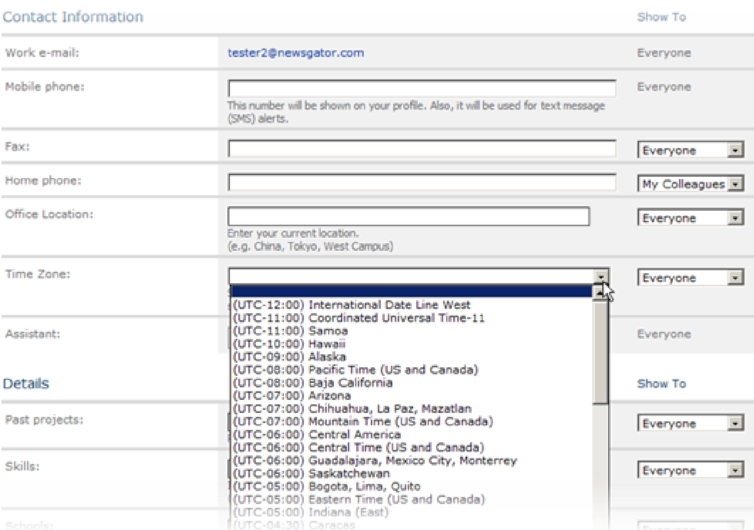
To fix this, do the following:

1. Go to your profile page.

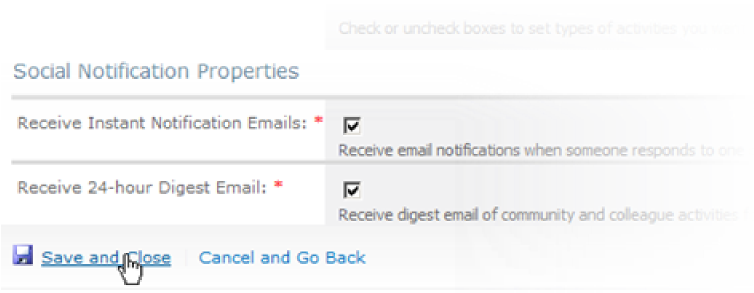



2. Click the **Edit My Profile** link.


3. Find the **Time Zone** dropdown, and select your time zone.

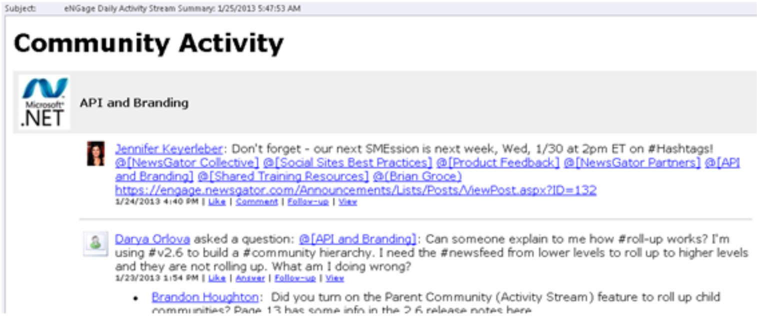



4. Click **Save** and **Close** at the bottom of the page.




## 1.52.2 Daily digest emails

Each user can opt to receive once a day by email a digest of the activity of the previous 24 hours from the communities and colleagues that they follow, and also from his or her self.




*Screenshot 877: An example of the top portion of such an email*

The events shown in the digest email can be either listed chronologically, or grouped by community in which they appeared and by the colleague that posted them.

The above picture demonstrates the latter way to organize them, with events from the community "API and Branding" appearing under a header with the title and logo of that community. Each user can choose in which of these two ways their digest email is organized.

Users can also customize the contents so that, instead of pulling in the activities of all the communities and colleagues that they follow, only the activities of some of these are gathered for inclusion in the digest email.

Doing so does not prevent all the activities of their **not included** colleagues and communities from appearing; some may still appear because some other community or colleague was involved. If the group-by- colleague/community format is used, the "not included" colleagues and communities won't have their own group heading within the digest, while the included ones will.

Users can also optionally include their own activities in the digest email. If the group-by-colleague/community format is used, these appear in their own section at the bottom of the email, titled **My Activities**.

Users can also optionally exclude either or both of the other two sections, **Community Activity** (which contains the activities that are organized under individual community headers) and **Colleague Activity** (which contains the activities that are organized under individual colleague headers).

In addition to the being able to configure the contents and organization of the email, users can configure the approximate time of day at which they'll receive the email. Details on how to configure all these options are in the next section.

A digest email is not displayed the same activity more than once. This important to note when using the group- by-colleague/community format, because it means that an activity that you would expect to appear under the header for the colleague that posted it actually does not appear there, because it appears somewhere else in the same email.

## 1.52.3 Weekly "Top 20" digest email

The weekly digest email includes the 20 highest scoring posts from the last week based on the "Top News" algorithm built into Aurea Social.

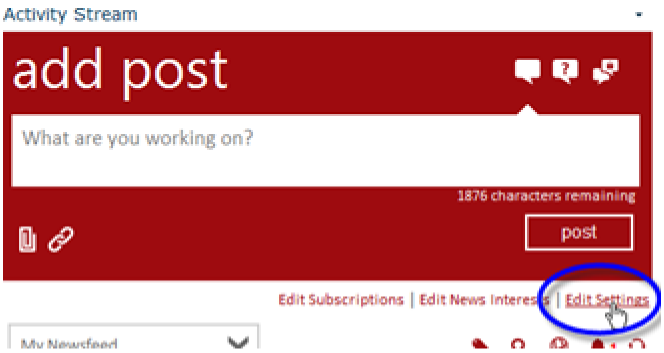
The top news algorithm tracks user preferences for particular tags, communities, types of activity stream events (e.g. questions) and other users.

The algorithm then scores each stream item based on all those inputs, and the highest scoring twenty items are included in the email.

### Configuring Weekly Top 20 Digest Emails

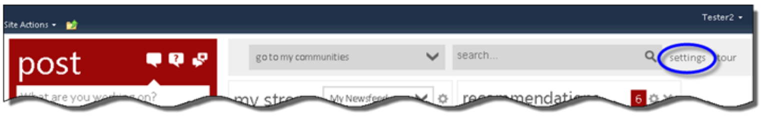
All options for the Weekly Top 20 digest email can be configured using the Edit Settings dialog. There are two places from which this dialog can be accessed.

One is from the **Activity Stream** web part, by clicking the **Edit Settings** link as shown:

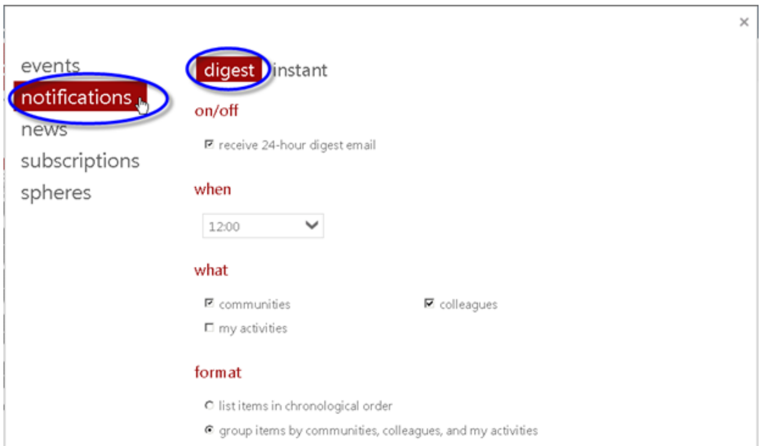



*Screenshot 878: Activity Stream*

The other is from the **Lookout** page, by clicking the **Settings** link:




Performing either of these actions opens the Edit Settings dialog. To get to the settings for the weekly digest, click on **notifications** in the left-hand column, then click on **Weekly Top 20** atop the page this brings up.




*Screenshot 879: Click **notifications***

### Opting In our Out

Users can begin receiving digest emails by checking the box titled **receive weekly top 20 email** in the **On/Off** section. They can later stop receiving weekly digest emails by unchecking it.

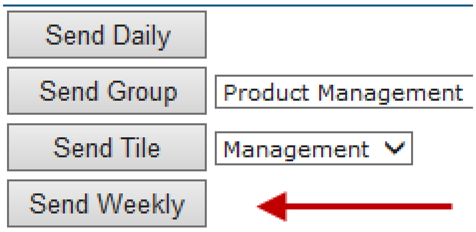
### Configuring delivery time

Use the **when** section to specify the approximate time of day and day of the week when you will receive your digest email. The digest should appear within about an hour or so of the hour selected in the dropdown. Times are specified in military format, so for example 13:00 is 1pm.

The feature is turned on from the Notifications portion of the settings dialog by enabling and then selecting a day and time (times are specified in military format so 13:00 is 1pm).

## Testing the Weekly "Top 20" Digest Email

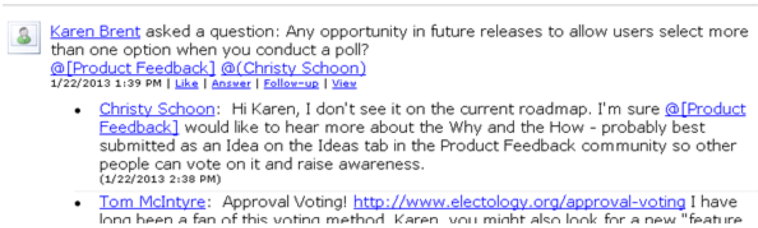
You can test the digest email output by going to the digest email test page at `http://[SERVERNAME]/_layouts/ng/DigestSettings.aspx` and clicking the **Send Weekly** button.




## 1.52.4 Using digest emails

You can like any event, comment on or answer it, or mark it for follow-up directly from either kind of digest email by clicking the corresponding link under the event in the digest email.

> **Note:**
> In the picture below that unlike in the web interface, you cannot like comments from the digest email. You also get no indication if you have already marked the item for follow-up.




When you click Like or Follow-up, a new email is started for you. Send the email without making any modifications, in order to complete the like or follow-up action.

Clicking on **Comment** or **Answer** also starts a new email for you. Type your comment or answer in the body of the email without modifying the To line or the Subject line.

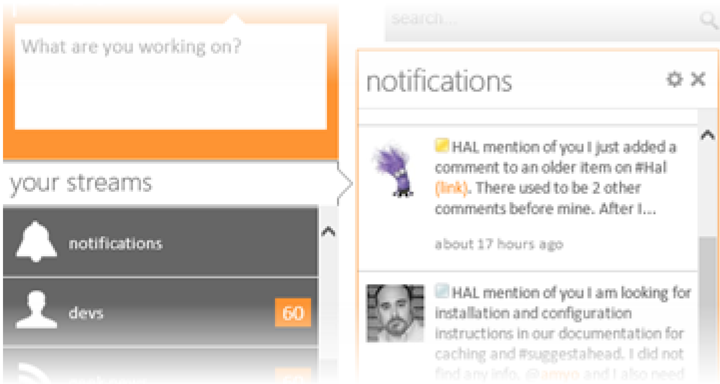
Make sure your reply is inserted above the horizontal line that appears in the body. This line is used to help determine where your message ends, so that any signature you add to your emails is not included in the response. Send the email to submit the comment/answer.

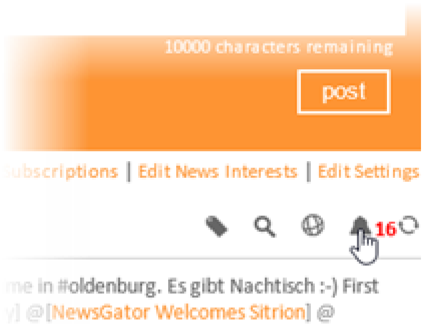

To access actions not available from the digest email, such as @ target autocompletion, hashtag autocompletion, or liking comments, lick the View link to open the item in a web page.

## 1.52.5 Instant notifications

Instant notifications inform users of events that are important to them. These can include posts and comments in which they have been mentioned, replies or likes on their content, or conversations happening in a community that they want to keep a close eye on.

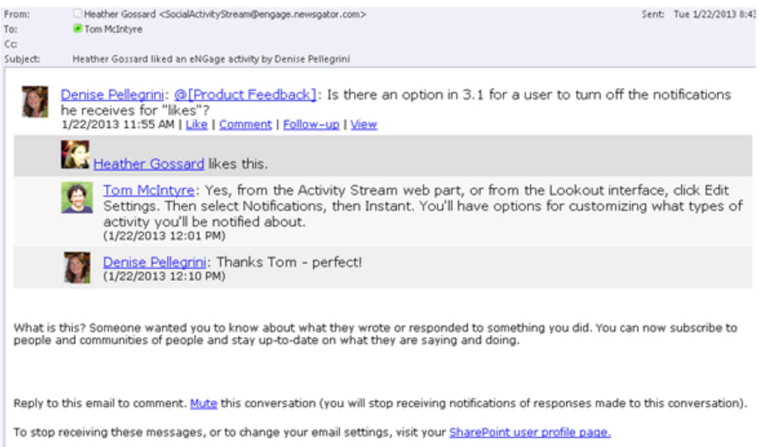
Instant notifications can be viewed in the Lookout Notifications tile, and by clicking the in the **Activity Stream** web part.




Additionally, when a user opts to get them, they'll receive a notification email for each instant notification they get. The notification email will be sent almost immediately after the event occurs.

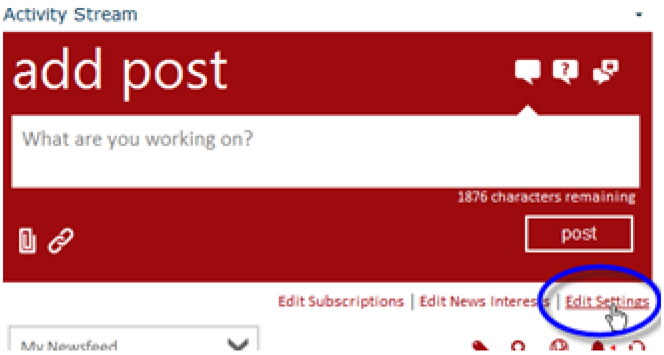
Here is an example of such a notification email:




## Configuring Instant Notifications

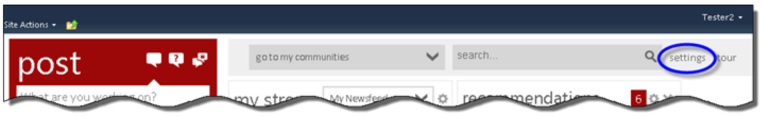
Users can choose which types of user actions generate notifications, and whether to get instant notifications by email as well as in the web UI, instead of just in the web UI. All of these settings can be made in the Edit Settings dialog.

There are two places from which this dialog can be accessed. One is from the Activity Stream web part, by clicking the **Edit Settings** link as shown:



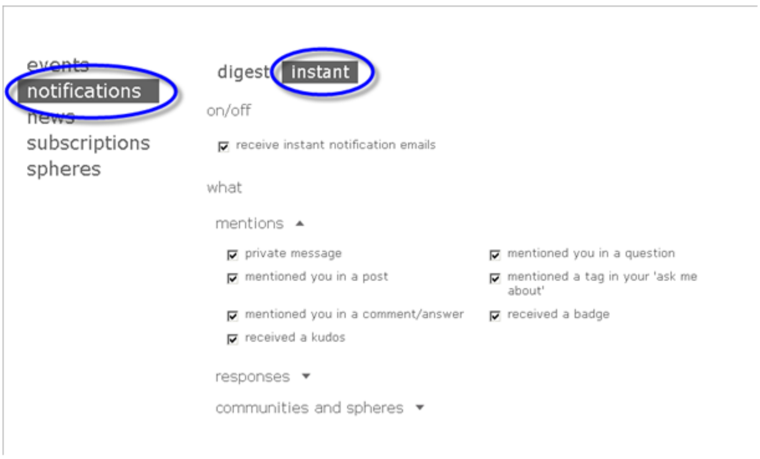

*Screenshot 880: Click Edit Settings on Activity Stream page*

The other is from the Lookout page, by clicking the Settings link:




*Screenshot 881: Click Settings on Lookout page*

Performing either of these actions opens the **Edit Settings** dialog. To get to the instant notifications settings, click on **notifications** in the left-hand column, then on **instant** at the top of the page:




## Opting In our Out of Instant Notification Emails

The "on/off" section applies only to email as an avenue for receiving instant notifications. Check **receive instant notification emails** to receive instant notifications via email as well as in the Activity Stream web part and in the Lookout Notifications tile. Uncheck to receive instant notifications only in the Activity Stream and Lookout.

## Configuring what User Actions Trigger Notifications

In the "what" section, users can choose to enable or disable notifications for any individual notification condition. These settings apply to emails and also to notifications received in the Activity Stream web part.

Notifications received in Lookout are restricted to the choices checked here, as well (although may be further limited by the settings for the Notifications tile).

The different types of user actions that a user may receive notifications for are grouped into three categories to make them easier to work with:

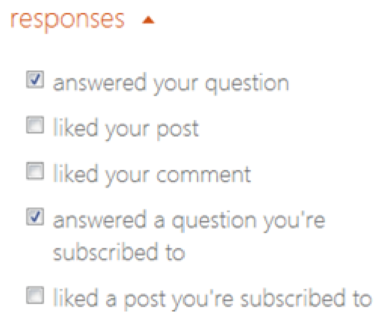
- mentions
- responses

- communities and spheres

The options appear under headers for each of these categories, but the header must be clicked to expand the category and display its options.

**Mentions** (shown expanded in the picture above) tend to be high priority notifications because they represent items where someone is specifically talking about the user (or are asking a question on a subject the user has explicitly said they are willing to help with.)

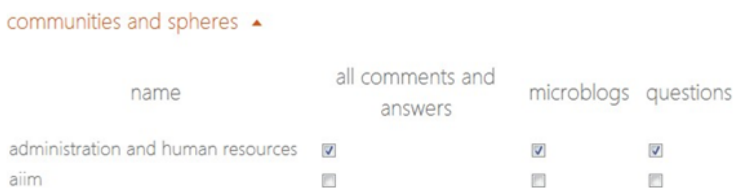
The **responses** section (with options pictured below) includes notifications that come from other users who are reacting to something done by this user, but are not specifically mentioning that user's name.




*Screenshot 882: responses*

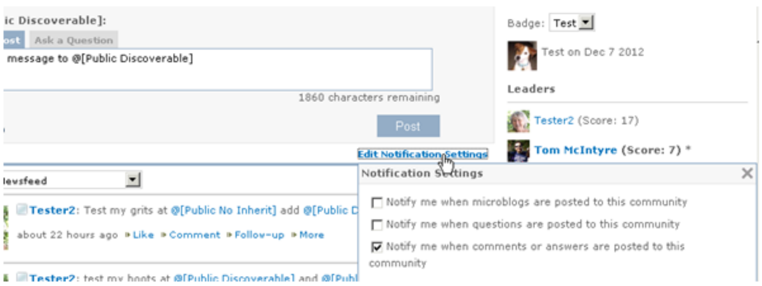
A user can choose to enable or disable each of these types of notifications. Note that if a user disables a type of notification here, that type is not available to include in a notification tile in the Lookout interface.

The **communities and spheres** section provides choices for each community or sphere the user is following. Users can choose to be notified of every new microblog or question sent to a particular community. Users can also choose to be notified of every new comment or answer that is made to activity stream items from that community.




*Screenshot 883: communities and spheres*

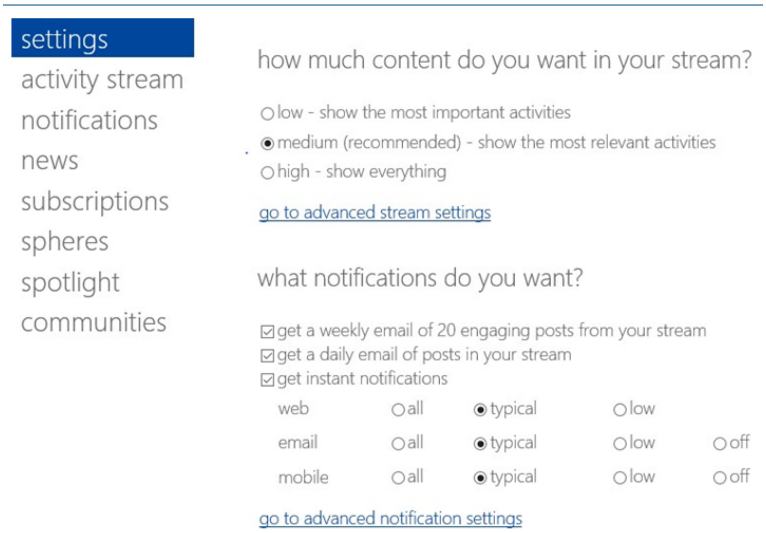
The settings in the **communities and spheres** section can also be configured on the site of the community to which they pertain, via the **edit notification settings** link on the community activity stream web part.




## 1.52.6 Notification channels settings

Starting in the 5.2 release, a new feature allows users to determine how they want to receive those notification messages (i.e. show in the web ui, send an email, or send a mobile push notification).

The design allows for users to make high level choices (e.g. only high priority notifications are sent as mobile push notifications) as well as specific decisions around each specific notification condition. Users can make high-level choices on the main settings page.




*Screenshot 884: Set the amount of content you want in your stream*

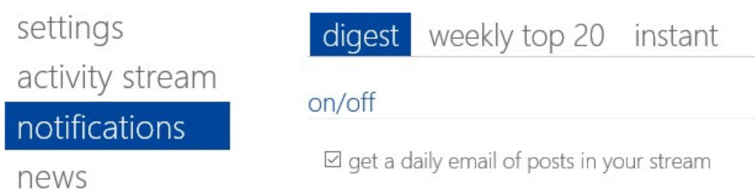
The radio buttons under **get instant notifications** let users choose low, typical or all for the different channels (web, email and mobile push).

Low only enables the most critical notifications (e.g. when the user is directly targeted in the message).

Typical is the default for new users and covers the most common scenarios users select for notifications. All enables every kind of notification in the system.

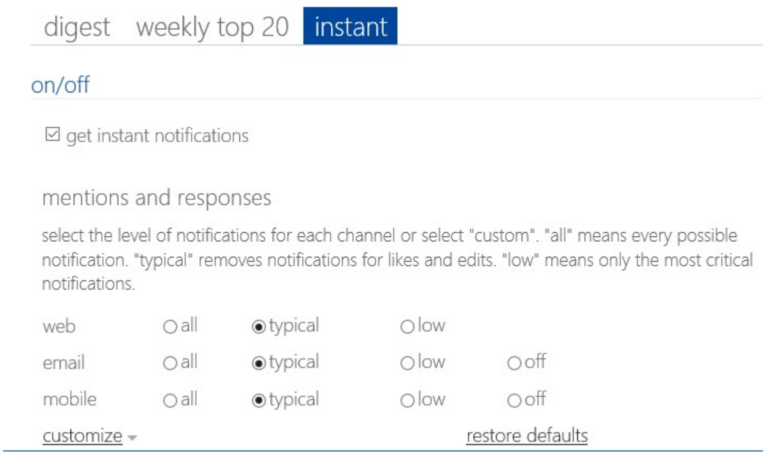
Email and mobile can be set to **off** meaning no notifications will be sent via those channels – the notifications showing the web UI can not be completely disabled. Note that the mobile channel settings cover both the Aurea Social mobile client and the ONE mobile client.

Click the **go to advanced notification settings** link to go to **Notifications** settings section.



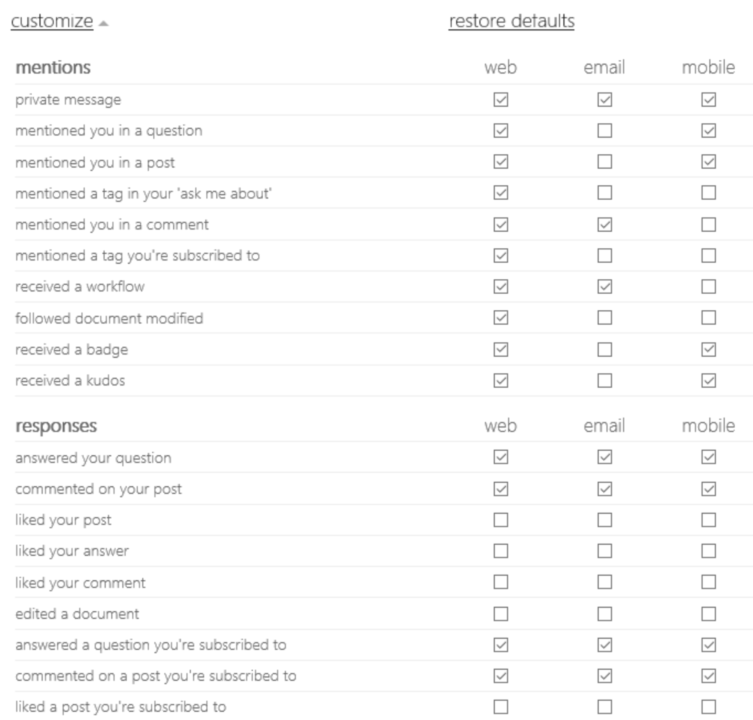

*Screenshot 885: **Notifications** settings*

Click on the **instant** tab to perform the same high-level settings as on the overall settings page, but now there is a **customize** link to allow even more granular selections.



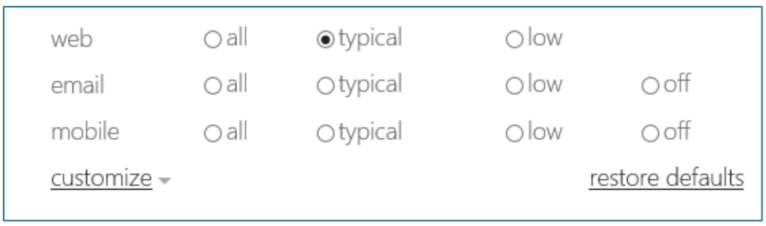

*Screenshot 886: Click instant tab*

Click the **customize** link to expands the screen to show all of the possible choices. Whatever high-level choices were made previously is checked, but users can check and uncheck any individual box here.




*Screenshot 887: List of all possible choices*

If a user makes selections that don't match one of the predefined levels (low, typical or all), the summary screen shows no radio buttons clicked.




*Screenshot 888: Click restore defaults*

Click the **restore defaults** link to reset the system to **typical** selected for all three channels.

## Using Instant notification emails

### Subject line

Depending on options implemented by your organization, you may see a subject line in a notification email that appears confusing after the first sentence. This is because the message to which the notification pertains is being previewed in the subject line, to help the user get an idea of what the message may be about. For example, the subject line of your notification email may look like this:

Joe Smith commented on an activity by Dan Baker.

… or it may look like this:

Joe Smith commented on an activity by Dan Baker. --> @tomr @bmalone Hey guys, do you have any documenta

In the latter case, things have been configured so that the first 50 characters of the original message are automatically included at the end of the subject line of the notification email. The " --> " here is just an example of text that the administrator who set up this option might have added in as a visual separator.

### Taking actions on the event

You can take actions on the event in your notification email by clicking links that are contained within the email, displayed just under the event text, or by replying to the email.


You can like the event, comment on or answer it, or mark it for follow-up directly from the notification email by clicking the corresponding link that is displayed under the event. Note that unlike in the web interface, you cannot like comments from the digest email. You also get no indication if you have already marked the item for follow-up.

When you click Like or Follow-up, a new email is started for you. Send the email without making any modifications, in order to complete the like or follow-up action.

Clicking Comment or Answer also starts a new email for you. Type your comment or answer in the body of the email without modifying the To line or the Subject line. Make sure your reply is inserted above the horizontal line that appears in the body.

This line is used to help determine where your message ends, so that any signature you add to your emails is not included in the response. Send the email to submit the comment/answer.


To access actions not available from the digest email, such as @ target autocompletion, hashtag autocompletion, or liking comments, lick the View link to open the item in a web page.

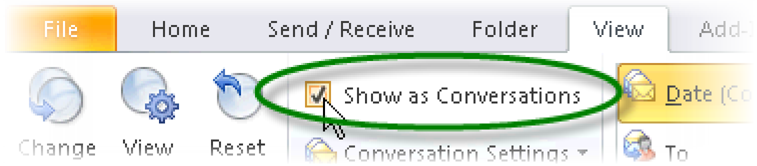
An alternative way to comment or answer on the event is to create a reply to the email using your email program's "Reply" option. Type your comment at the top of the reply email, without deleting anything that prepopulated in the email body or the subject line, and send to submit the comment or answer. This option is currently the only means of taking action on the event from the notification email for BlackBerry users.

## Using the Outlook Conversation View to manage long conversations

If you are set up to get notifications for a particular conversation, and that conversation gets a lot of responses, it can be time consuming to manage all the different notification emails you get for that conversation.

Your experience of the conversation may also feel disjointed as your attention is pulled into and out of it, because you are reading other emails that arrived in between the notifications for the conversation.

If you have Outlook 2010 or higher, you can alleviate these difficulties by using the Conversation View, which can be activated by checking **Show as Conversations** on Outlook's View tab:




*Screenshot 889: Check **Show as Conversations** chekbox*

Beginning with Skyvera Social 3.0, notifications about the same activity stream item will all be grouped together when Conversation View is in use.

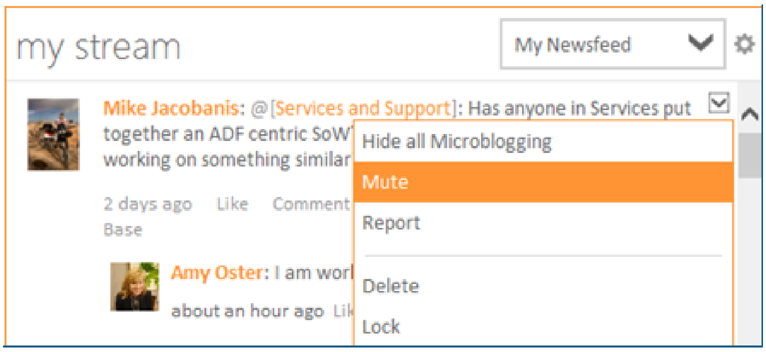
In the example below, several people have reacted to a question in the activity stream with a combination of answers and likes. All of the notification emails are grouped together in Outlook.


## Ending notifications for a conversation

If you continue getting notifications for an activity stream item that no longer holds value for you, you can stop notifications from being sent to you for that item by clicking the **Mute** link at the bottom of any of the notification emails you have received for it.


*Screenshot 890: Click Mute*

You can also mute an item via the web interface by opening the dropdown menu using the "chevron" control in the upper right corner of the item's display in the stream, and selecting **Mute** from this menu.




*Screenshot 891: Muting an item from web interface*

It can take up to a minute for the server to process your mute request.

After you mute the conversation, someone may post a response to it in which you are explicitly targeted. Because in this case it is likely that you are being asked to provide a response, it is assumed that you want to be notified of this, and your notifications will resume for that conversation. You have to mute the conversation once again to prevent notifications for responses that are made after that.

## Following a Tag

Users can opt to get a notification of any public microblog or question that contains a certain hashtag or hashtags. There are two things they must do to set this up.

The first is to select the **mentioned a tag you're subscribed to** notification option.

For further details, see the Configuring what User Actions Trigger Notifications section in Configuring Instant Notifications.

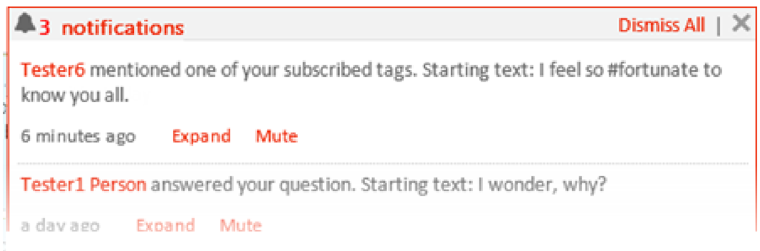
The other thing they must do is go to the Instant Notifications area of the Settings dialog.


*Screenshot 892: Go to instant notification*

On that page is a **subscribed tags** section.


In this box, the user types in each tag they'd like to subscribe to, separating multiple entries by semicolons. They must click the **Update subscribed tags** button to commit the changes (this is one of the only settings in the Settings dialog that requires a save step). The button will flash the word **Saved** when the change is committed.

The user is then notified of any public microblogs or questions that contain a hashtag matching one of the tags entered here.




*Screenshot 893: Notifications*

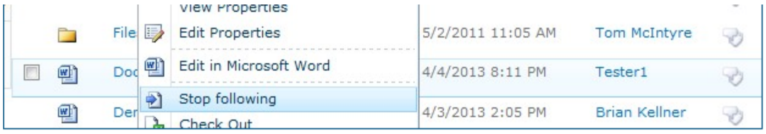
## Following a document

Frequently, users may want to see if a particular document has changed but not care about an entire document library.

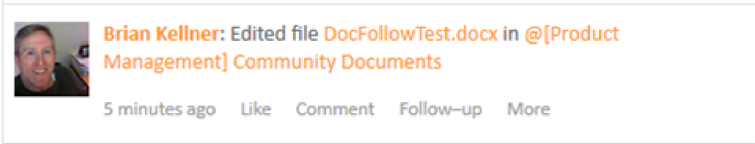
SharePoint 2013 implemented a "follow a document" behavior that creates events which Aurea Social can display in the activity stream.

For SharePoint 2010, Aurea Social includes a feature to let users do the same thing. On any site where a site administrator has enabled document following, users can select the **Follow Document** option from actions menu 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 not only as an activity stream item, but now additionally as a notification.




# 1.53 Aurea Social Idea Stream

## Overview

The Newsgator Aurea Social Idea Stream module is a separate module that supports the crowdsourcing of ideas. When used in conjunction with the Innovation Solution, it provides a comprehensive innovation offering.

## 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.

## 1.53.1 The Campaign page

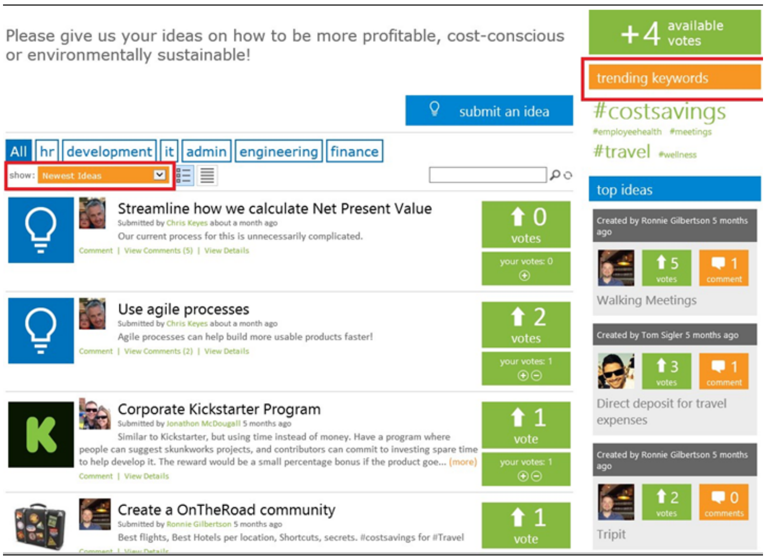
The campaign page is a place where users can browse, search, vote, comment and add ideas.

**Browsing Ideas**

### Trending Keywords and Show Filter

The user has a number of options for browsing ideas including a trending keywords box and a set of filters.

The trending Keywords box displays the most popular hashtags for the ideas. The **Show** filter sorts and filters by various criteria including the newest Ideas, the most popular, and the most commented.




Screenshot 894: The show filter

## Browsing by category

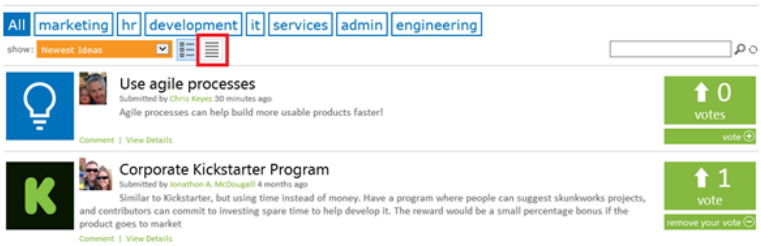
If categories for the campaign have been specified and users have selected them on idea submission, then ideas can be browsed by category by clicking in the right box. See Finance below.


Screenshot 895: Click Finance

## Brief View

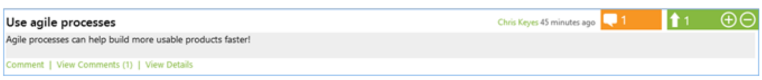
The brief view helps end-users and leaders to scan sets of ideas to find the ones most interesting to them.

The brief view option is located beside the verbose option (the default view) both of which are beside the campaign filters.



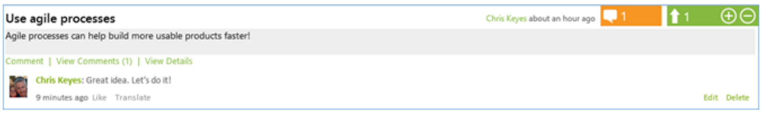

Screenshot 896: The brief view option is highlighted in red

Clicking anywhere on the idea title line expands the idea to show the details and links to comment, view the comments (if any) or see all of the idea details ("View Details").




Clicking on **View Comments** shows the comments.

Clicking on the number-of-comments icon on the first line (beside the submitter name and submit timeframe) provides this fully expanded view (even initially).




## 1.53.2 Submitting an idea

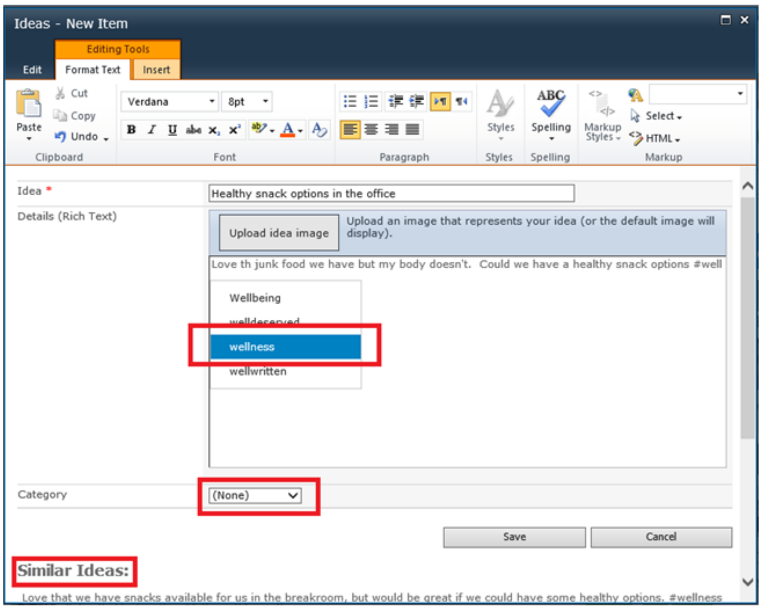
Submitting an idea is as easy as clicking on the **Submit an Idea** button. An idea form opens up where the user can enter the idea title and description.

Not unlike how microblogging suggests words to be hashtagged, the new idea submission form suggests potential words to be hashtagged.

This feature works nicely with the new trending keywords feature (mentioned above) to help innovation managers identify trends that may help in the creation of follow-on idea campaigns or Innovation Labs (see below for more details).

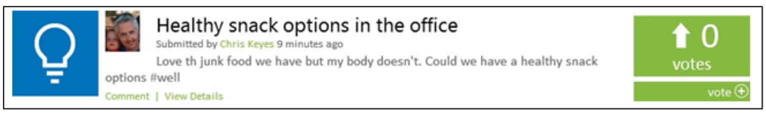
Campaigns can also have a configurable set of categories and users are prompted to select one at idea creation.

Leveraging the technology used to suggest related questions and microblogs in the standard Aurea Social activity stream, similar ideas are displayed to the user at idea creation to help reduce the number of duplicate ideas and to encourage awareness and collaboration among users with like-minded ideas.



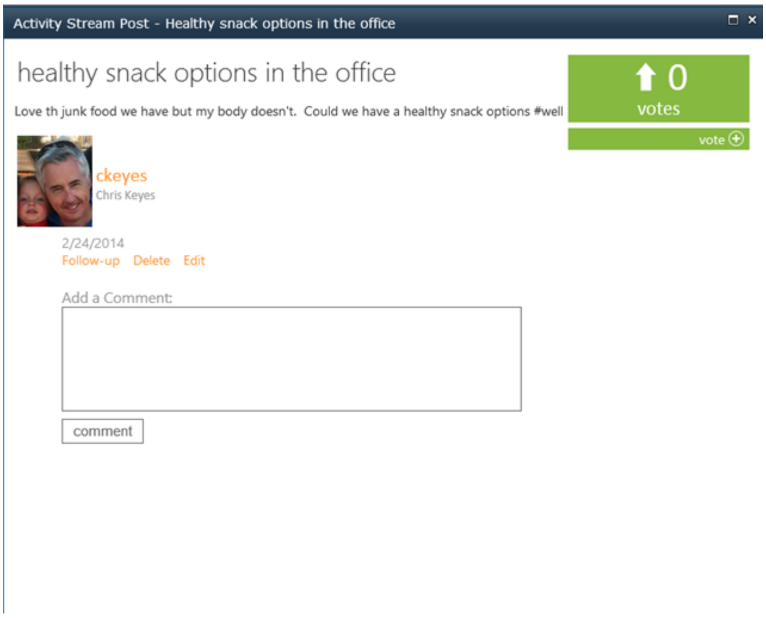

The user can also override the default idea icon by clicking on Upload idea image. This prompts for a picture to be uploaded. Adding the picture replaces the default picture (white light bulb on blue background).

After the idea is created, it displays on the campaign page with the other ideas. If the user decided to attach an image it would display in lieu of the blue light bulb icon.

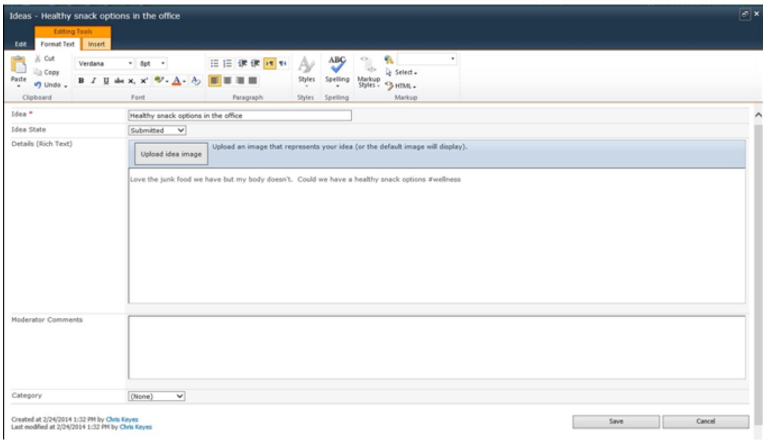



*Screenshot 897: Click View Details*

Clicking on the **View Details** link for an idea pops up a console with all of the data about the idea (including any attachments). Users can vote or remove votes from the detail view as well as adding comments.

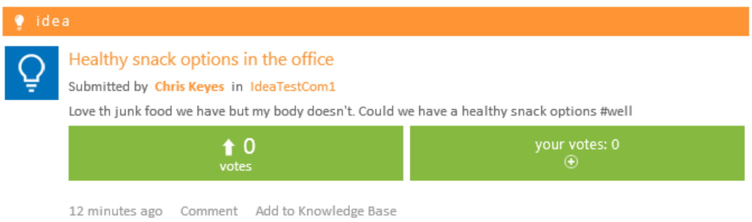



Users who have edit rights can get to the edit item screen and make changes (such as changing idea status to promoted).




*Screenshot 898: Edit item screen*

To vote on an idea in the stream, click on . To comment, click on Comment.




## 1.53.3 Campaign modes

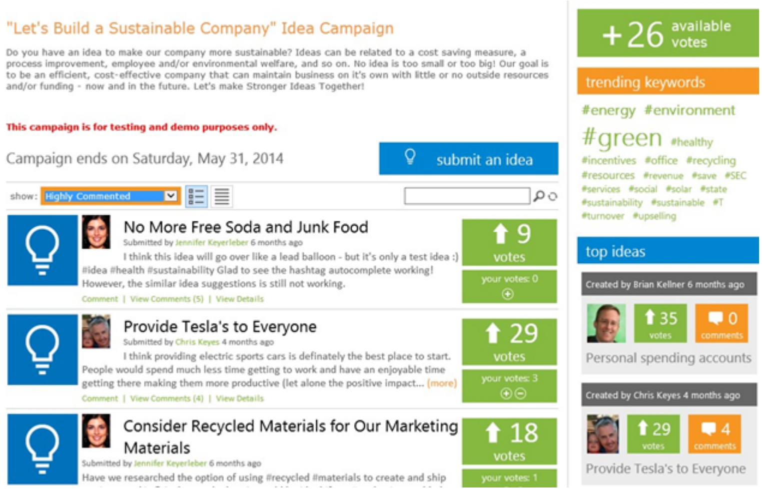
There are three campaign modes:

- Marketplace
- Suggestion Box
- Classic

For further details on how to configure, see the Admin Guide.

#### 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.



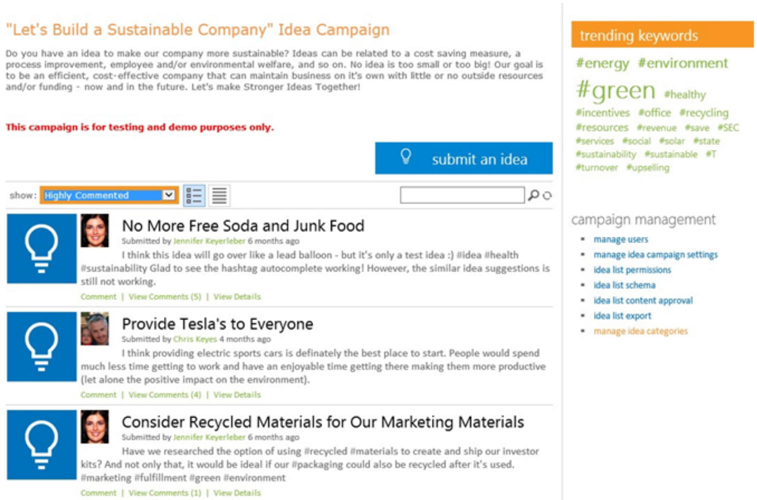

*Screenshot 899: A sample marketplace mode campaign that grants 26 votes per user, has started but hasn't reached the end date yet*

#### 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.

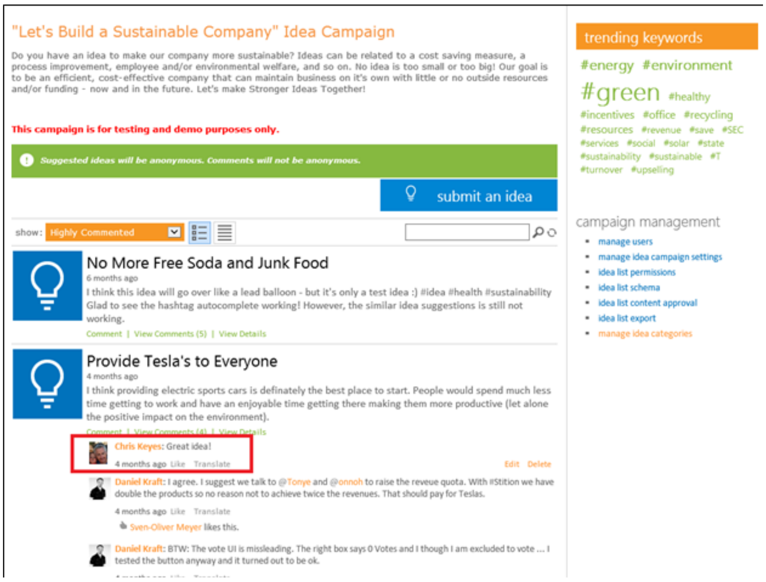
There is no voting in this mode. In some environments, transparency is enhanced when users can submit anonymously and so this is an optional setting for suggestion box mode.

> **Note:**
> Comments on ideas in anonymous mode are NOT anonymous.




*Screenshot 900: An example of a campaign with suggestion box mode turned on*

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):



Screenshot 901: An example of a campaign with an anonymous suggestion box enabled

**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.

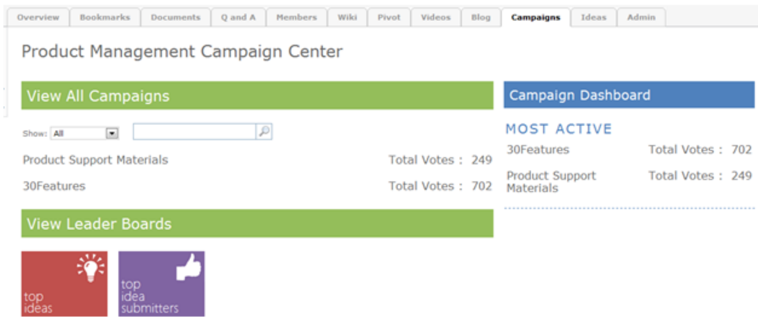
Classic mode campaigns do not support automatic start and end dates and do not have an anonymous submission option.

Like the other modes, classic mode campaign capabilities are driven by the setting of the other (last four) parameters.

## 1.53.4 Campaign Rollup pages

Usually, a company runs 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 leader boards for ideas and idea submitters.



Screenshot 902: Product Management Campaign Center

## 1.53.5 Finding Campaigns

The **View All Campaigns** section defaults to showing all campaigns, active or not, which have been created as direct sub-sites for this community. These are displayed in multiple pages when there are more than five.

Click on any campaign's name to go to that campaign's site. This list can be filtered by campaign status and by search terms.


*Screenshot 903: View All Campaign*

To see a list of all active campaigns without any inactive ones, set the dropdown control to **Open**. A campaign must have either voting enabled or idea submission enabled to be in this list (or both). If it has start and end dates, the current date must be between these as well.

Campaigns with a start date that has not yet arrived appear when you select **Scheduled**.

All other campaigns appear when you select **Closed**. Specifically, a campaign appears under this filter when matching any of the following descriptions:

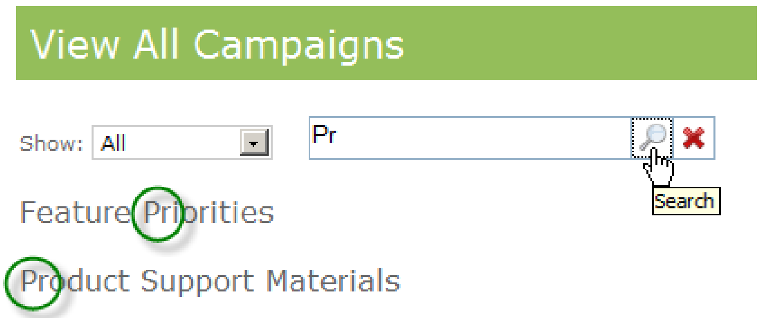
- a) voting or idea submittal are enabled, but it has an end date which has passed;
- b) voting and idea submittal are both disabled, and it has a start date which has passed;
- c) voting and idea submittal are both disabled, and it has no start or end dates.

In each of the above three filters, campaigns are listed in alphabetical order. In the default **All** filter, open campaigns are listed first (alphabetically), followed by closed campaigns, then followed by scheduled campaigns.

Whichever of these four filters is selected, you can further narrow down the list of campaigns using the search box.

For each search keyword entered, a campaign must have at least one word in its name beginning with that keyword if it is to display.

For example:



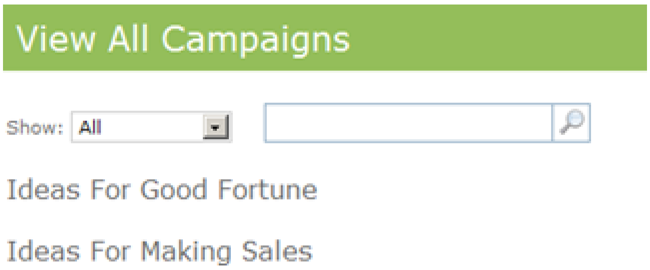

In this example, both **Feature Priorities** and **Product Support Materials** appear in the results because they each have a word beginning with the letters "Pr". A campaign named **Good Compromises** would not show in these results even though the word "compromises" contains the letter pair "pr", because these letters do not appear at the start of a word.

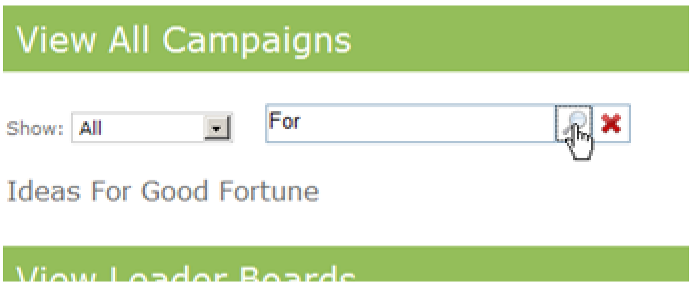
If we add another search keyword to our search, we can narrow the list down further:


**Feature Priorities** is eliminated because none of its words begins with "Mat", but "Product Support Materials" is still a match.

> **Note:**
> Keyword searches don't match to "noise words" such as "for" and "and".

In the following search on the keyword "For", "Ideas For Making Sales" is not a match because it is treated as if its name is Ideas Making Sales - the noise word "For" is not counted. "Ideas For Good Fortune" still matches, because the word "Fortune" is matched.




## 1.53.6 Viewing Campaigns of Interest

The Community Dashboard shows campaigns that have the most votes in the **Most Active** section.

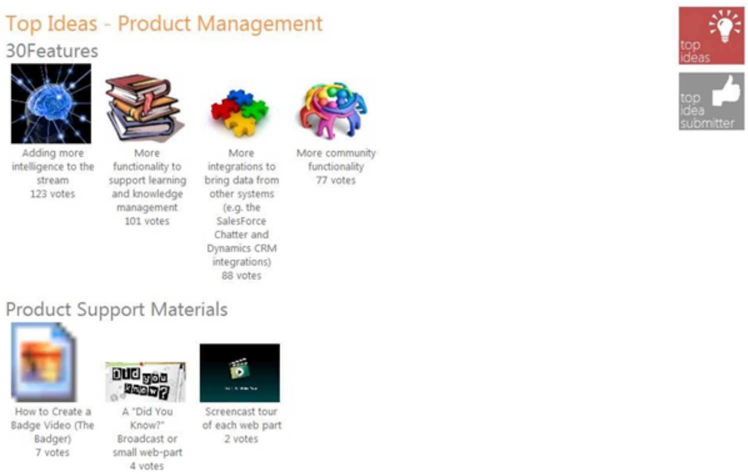
If campaigns have started recently, they are displayed in the **Recently Added** leaderboard. Campaigns that have an end date that arrives soon appear in the **Ending Soon** section.


*Screenshot 904: All Campaigns Dashboard*

## 1.53.7 Finding Leading Ideas and Submitters

The **top ideas** and **top idea submitter** buttons at the bottom give access to the leaderboard views.


The **top ideas** view shows up to the four ideas that have the most votes for each active campaign.



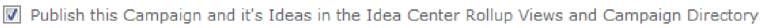

The **top idea submitter** button switches the view to show users whose ideas have accumulated the most total votes in each active campaign.



### 1.53.8 Global rollup page

A global campaign rollup page is automatically deployed to `http://[ServerName]/_layouts/ng/idea/ideacenter.aspx`.

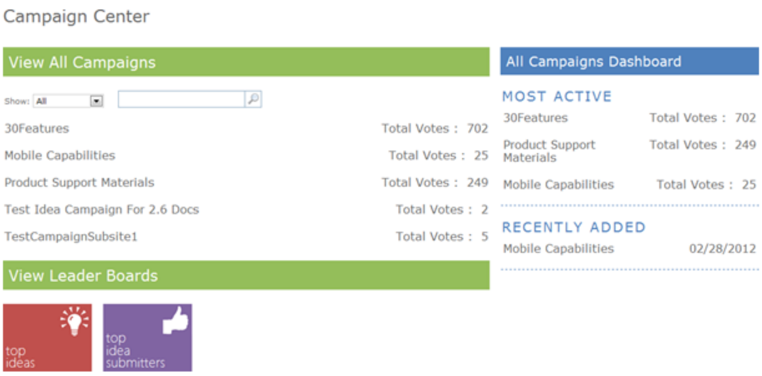
This page has identical functionality to the community page detailed above. The primary difference is that campaigns are listed on this page, and their ideas on the leaderboards of this page, because the "publish" setting is checked on the manage idea campaign settings page.




*Screenshot 905: Check this checkbox*

> **Note:**
> 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.




*Screenshot 906: Campaign center*

> **Note:**
> 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.

## 1.54 Aurea Social Innovation solution

The Innovation Solution is an optional and separate offering from the Aurea Social core offering. It includes all the features that relate to the crowdsourcing, evaluating, and executing of the innovation process. The Innovation Module includes and requires the Idea Stream module.

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.

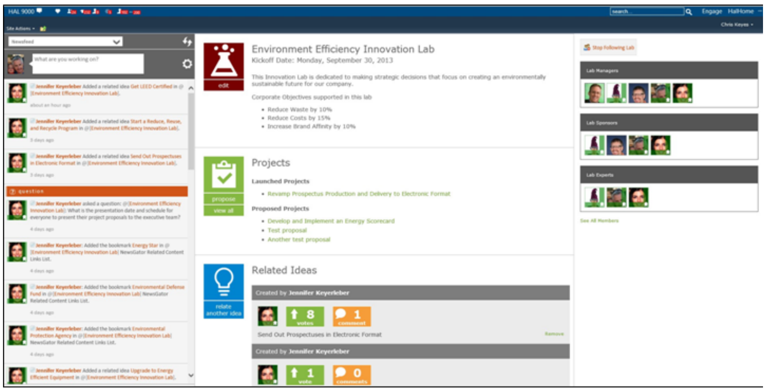
To ensure that the entire innovation process aligns with and supports corporate objectives, the Innovation solution includes a mechanism for specifying corporate objectives that can be cross-referenced to labs, project proposals, and projects.

To ensure that the overall innovation process is fruitful, a set of dashboard reports are available.

## 1.54.1 Implementing ideas

Here you can learn to add, review and evaluate ideas. Also you can learn how multiple expert assessment work and about viewing and about viewing and commenting on project proposals.

Innovation Labs




*Screenshot 907: Innovation labs*

### Adding Related Content

Members can add documents and links that relate to an Innovation Lab (e.g., research).

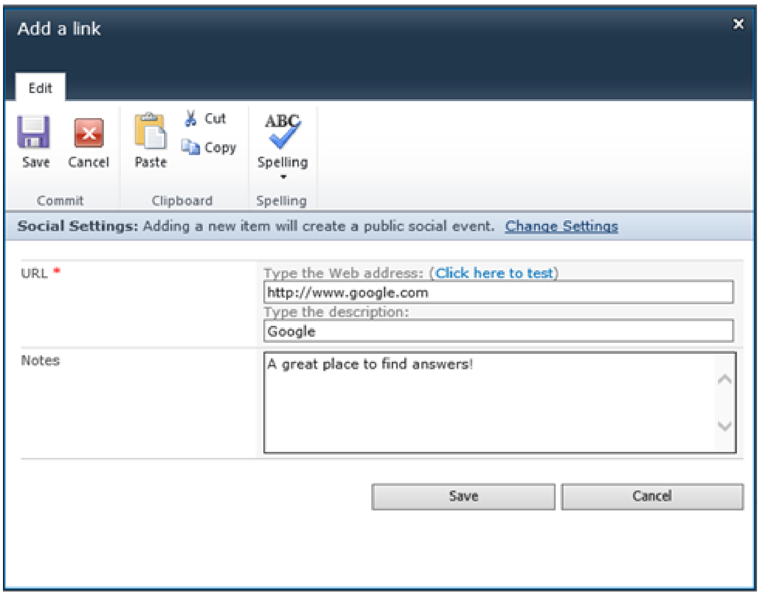

*Screenshot 908: Click add a link or upload file*

To post link:

1. Click on **Add a Link Add a link** dialog pops up.

2. Enter the URL, description, and notes.

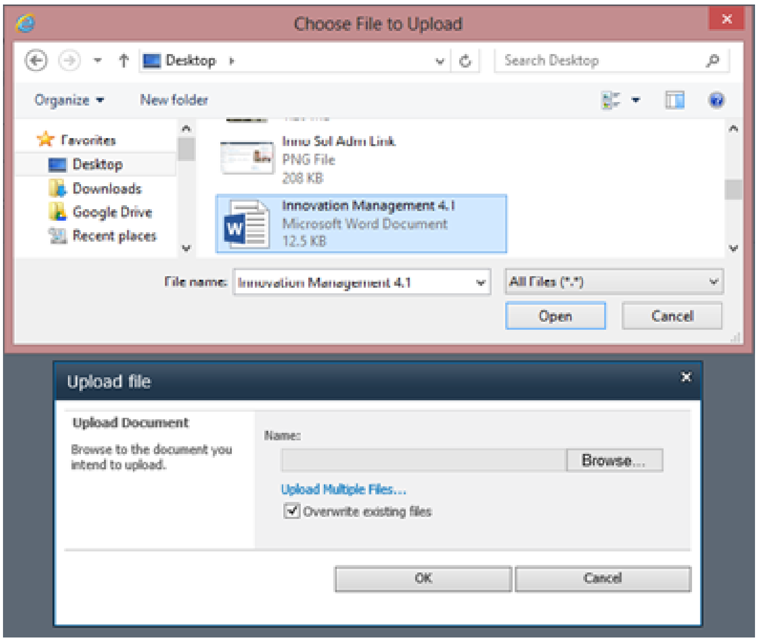
3. Click Save to post the link.




*Screenshot 909: Use this dialog to add a link*

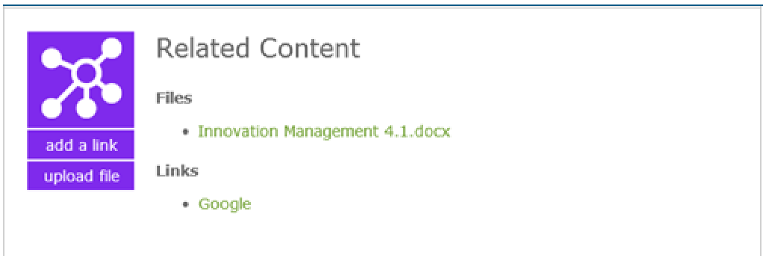
To upload file:

1. Click on Upload File. **Upload file** dialog pops up prompting for file.
2. Click on **Browse**. A file chooser is opened.
3. Choose file and click **OK** on **Upload file** dialog.

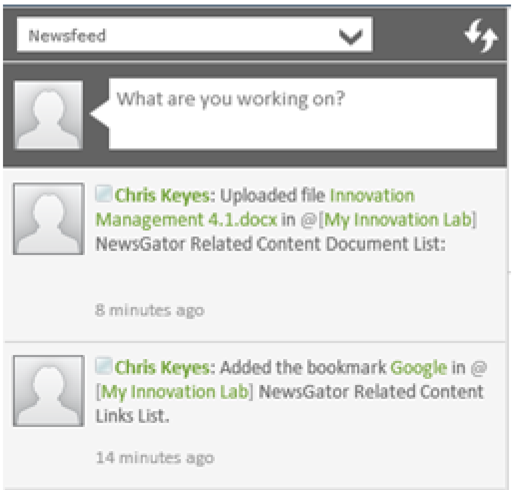



*Screenshot 910: Use this dialog to upload file*

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).

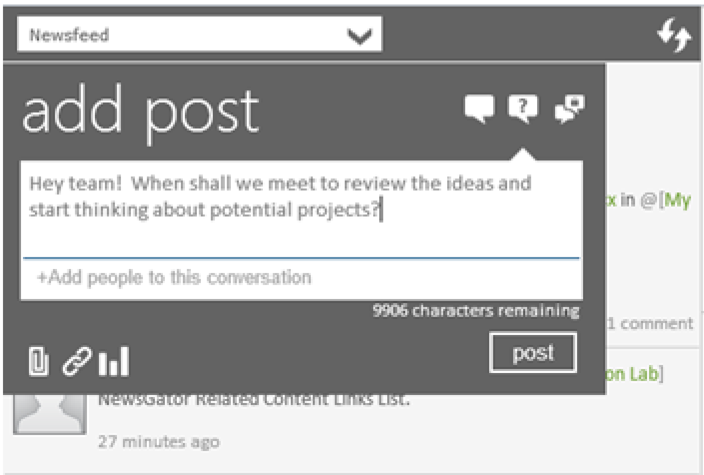



### Communicating in the Innovation Lab

The lab has it's own stream which is ideal for communication within once the Lab has been set up, supporting ideas have been associated with it, a team of Experts and Sponsors has been assembled, related documents and links are uploaded, the real work of the lab can begin.

The community features of the Lab are ideal for supporting contextual conversations that analyze the options and propose different ways of implementing them.

Experts and Sponsors has a special icon to indicate their role making them more visible in the stream (not shown below).

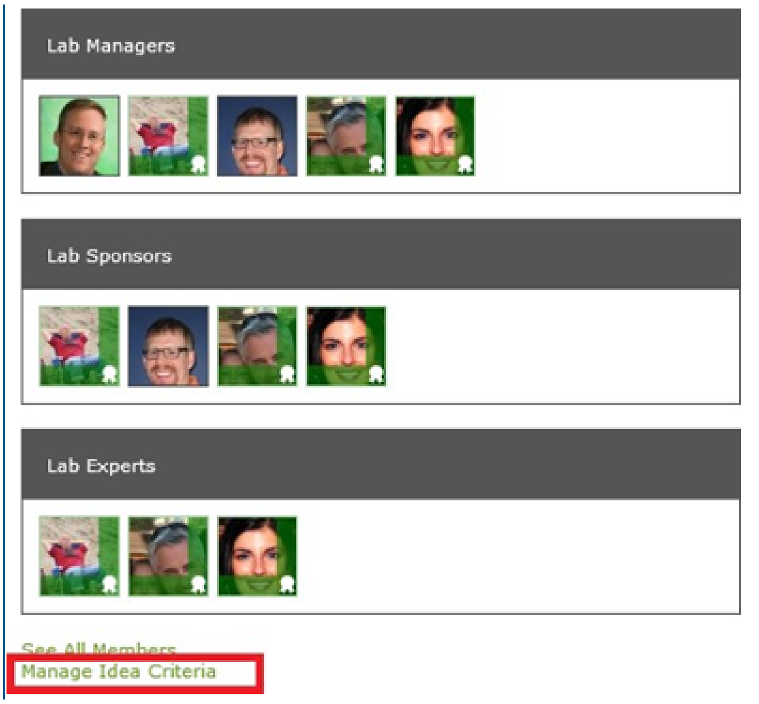



### Assessing Ideas

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.

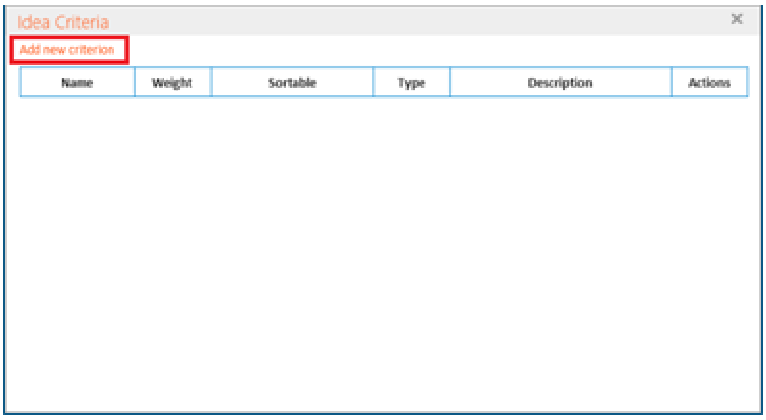
To specify these criteria, do the following:

1. Click on **Manage Idea Criteria** under **See All Members**. A panel is displayed where the idea assessment criteria can be specified.

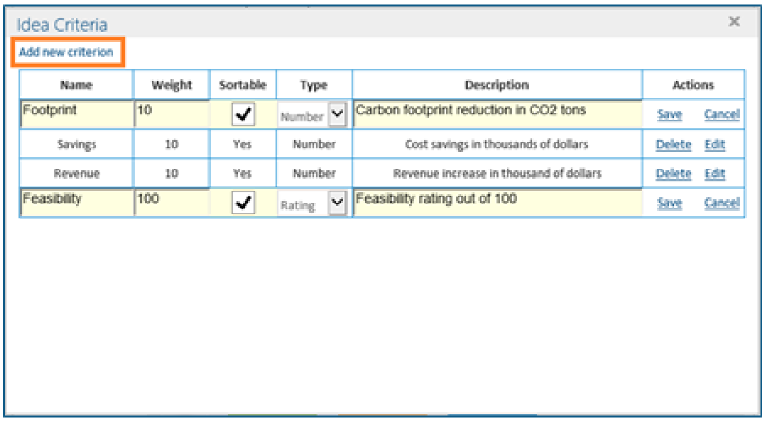



*Screenshot 911: Click Manage Idea Criteria*

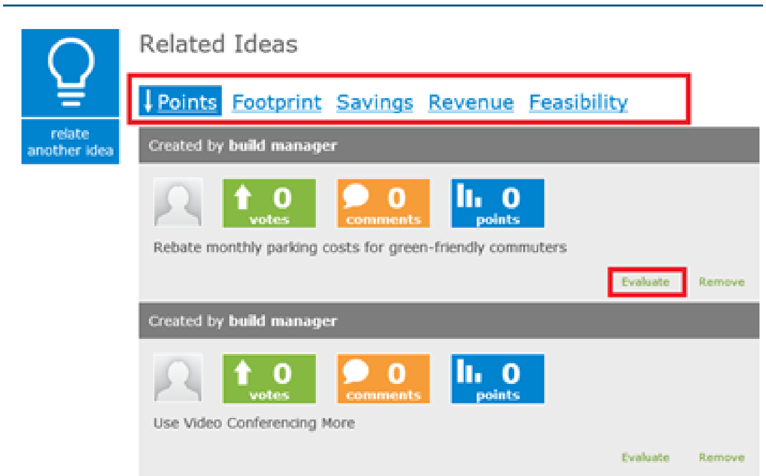
2. Click on **Add new criterion**.



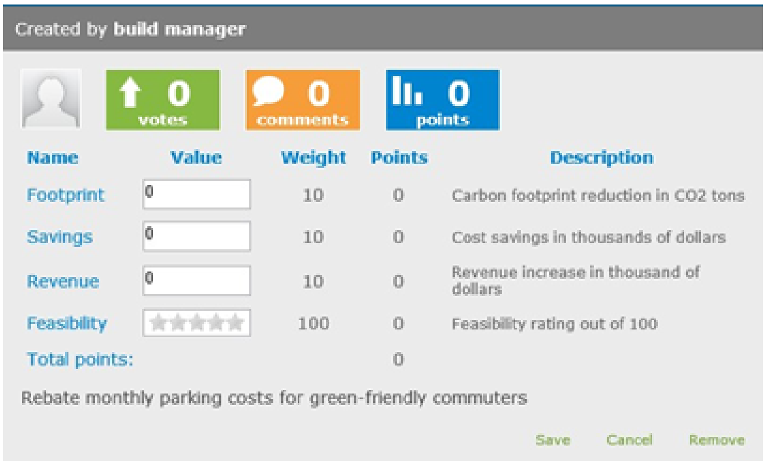

3. Enter the criteria. Each criteria has a name, a type and a weight. Initially there will be two criteria types: rating and number. The sum of the criteria (times the weight) comprises the score of the idea.



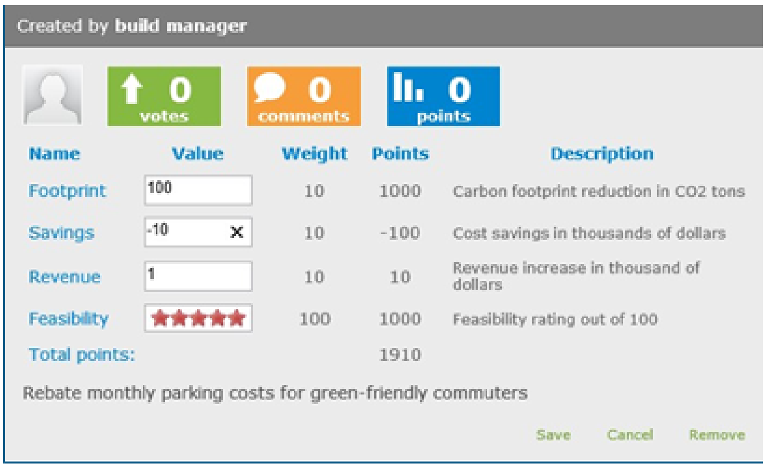
Once the criteria (at least one) are defined, sort options display in the Related Ideas area. There is one sort link for each criteria and one for overall points. A points box appears on each related idea as well as an **Evaluate** link.




Clicking on **Evaluate** presents an area for the expert to input the assessment data as seen below.



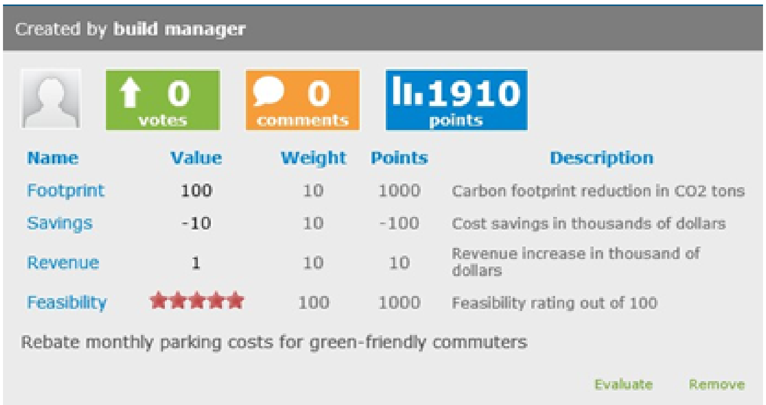

The expert can then click on the appropriate star for the rating-based criteria and enter a number of the value for the number-based criteria and then click **Save**.




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



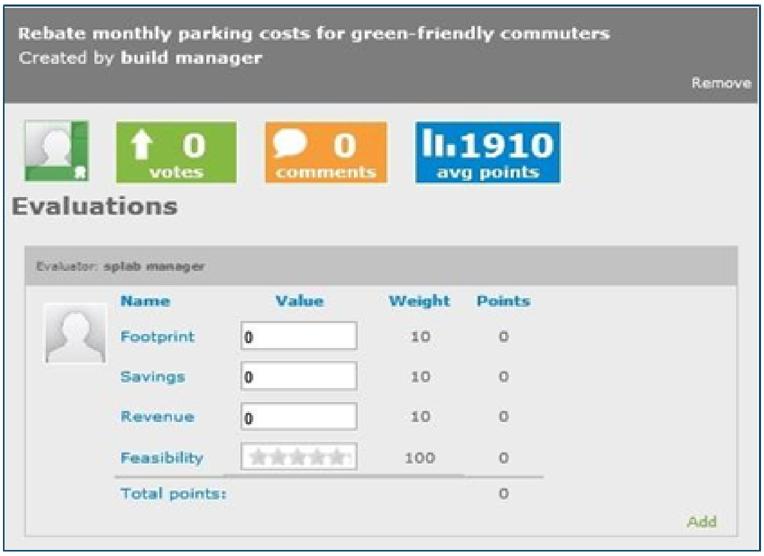

*Screenshot 912: This idea is worth 1910 points*

## Multiple Expert Assessments

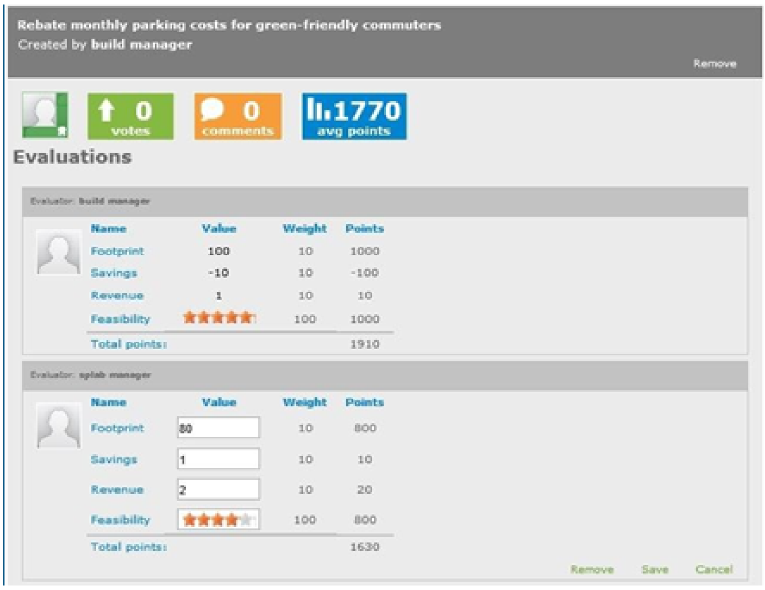
In the 4.5.2 version, we introduced the ability for one or more experts to evaluate each Idea in the Related Ideas list.

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.

> **Note:**
> An expert that has not yet evaluated an Idea only sees the overall averages for the individual criteria(s) and the total points for the Idea.




Once an expert creates their own evaluation, the individual evaluations of the other experts is visible.

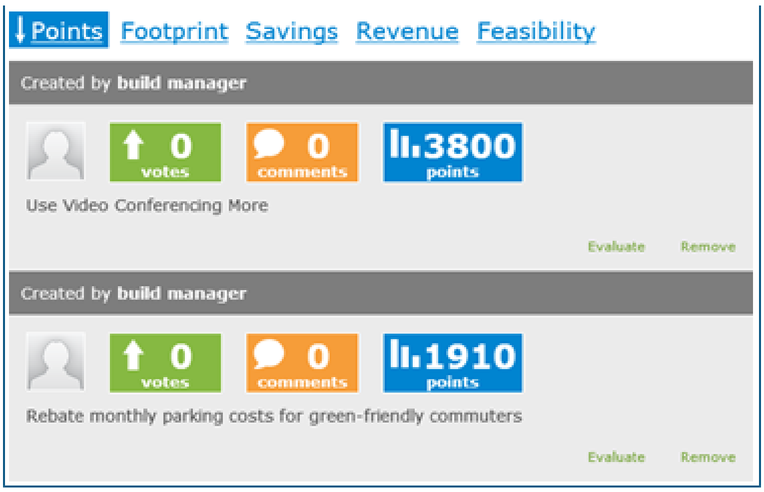



## Reviewing the Assessments

To review the evaluations by overall points and the various criteria, click on the appropriate filter.

By **Footprint**:


*Screenshot 913: By* ***Footprint***




*Screenshot 914: By* ***Points***

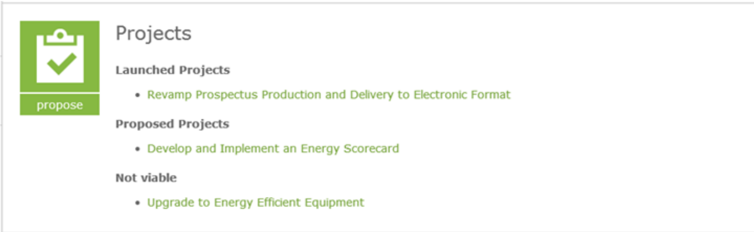
### Project Proposals within an Innovation Lab

Now that ideas have been assessed, those worthy of implementation need to be proposed as projects.

## Viewing and Commenting on Project Proposals

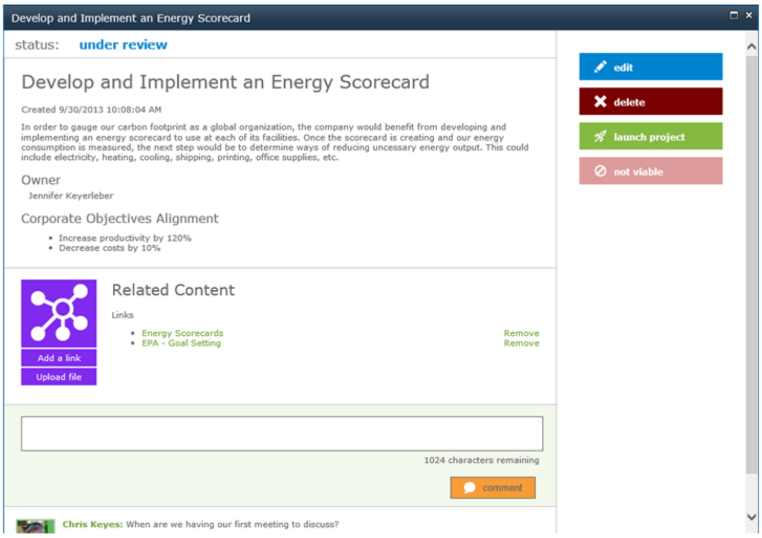
Project proposals in their various phases can be viewed in the projects area on the main lab page. Launched Projects are projects that have passed the various internal business case gates and have had project communities created to support the execution process. Proposed Projects are still being analyzed and evaluated, and have an initial status of "Under Review".

Projects that get reviewed and are considered not viable are marked accordingly.

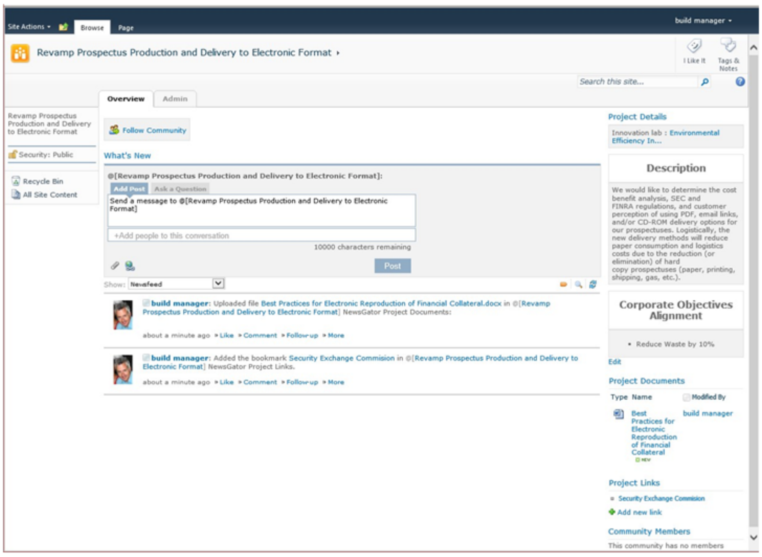



*Screenshot 915: A sample list of project proposals at various stages*

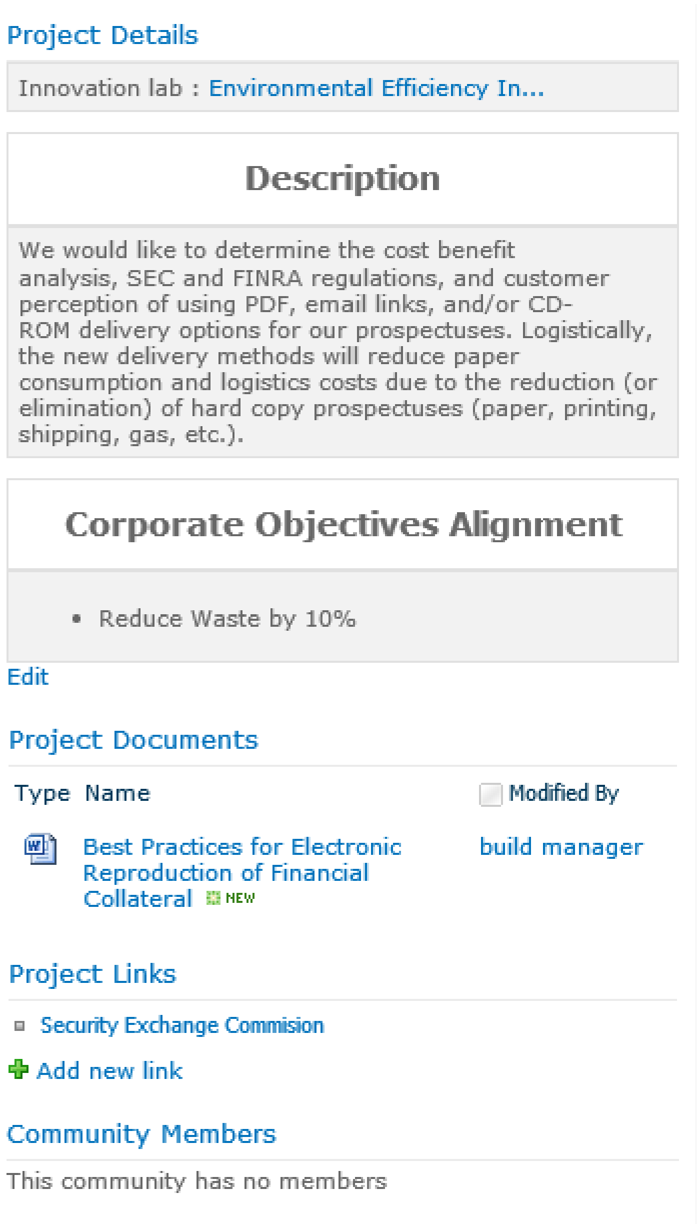
Clicking on a Project Proposal (like "Develop and Implement an Energy Scorecard"), let's you see more data about it and allows you to comment. The other actions available depends on your role.




Here is an example of a launched project (clicking on from the lab takes you here):



**Note:**
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.




# 1.55 Aurea Social News Stream

This section provides a few useful information about Aurea Social News Stream.

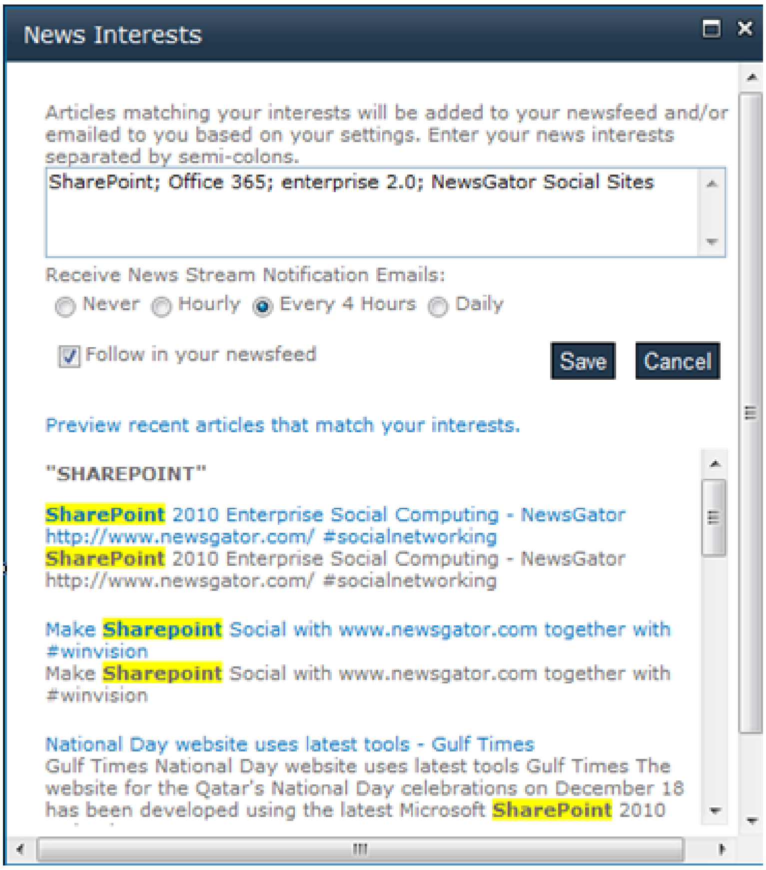
## 1.55.1 Activity Stream Display of News Events

**Activity Stream Display of News Events**

For personal tracking of news interests, users can enter key words or key phrases and get links to matching articles in their streams.

This they do via the **Edit News Interests** link in the **Activity Stream** web part, or via the News portion of the **Settings** dialog.

Either of these navigation options provides a simple box in which they can put their interests.




*Screenshot 916: The interests box are radio button options for frequency of emailed digests of news*

The **Follow in your newsfeed** checkbox allows a user to decide if they want news events showing in the activity stream. The result of these options are:

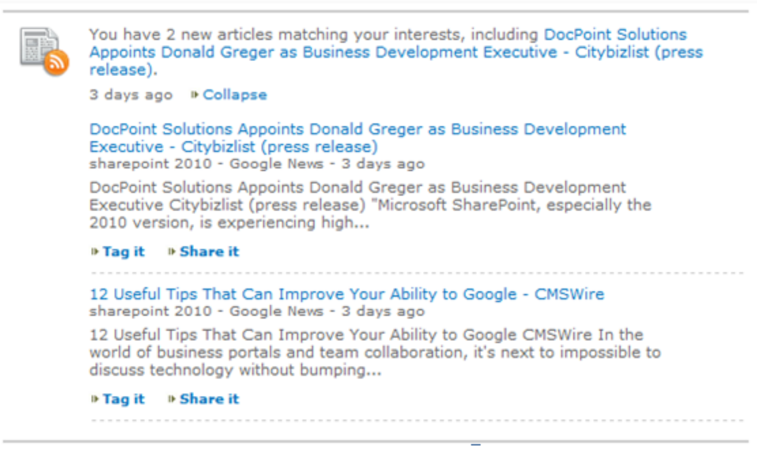
- no news in any delivery,
- news events only in the activity stream
- news only in digest emails
- news both in the activity stream and in digest emails

If you click on the **Preview** link it shows the most recent matching stories for the interests with highlights to show where the search matched (if any matches happened in the title or first words of a story).

The **News Stream** job periodically checks recently retrieved articles to see if any match the specified interests. If there are any matches, a news event is created.

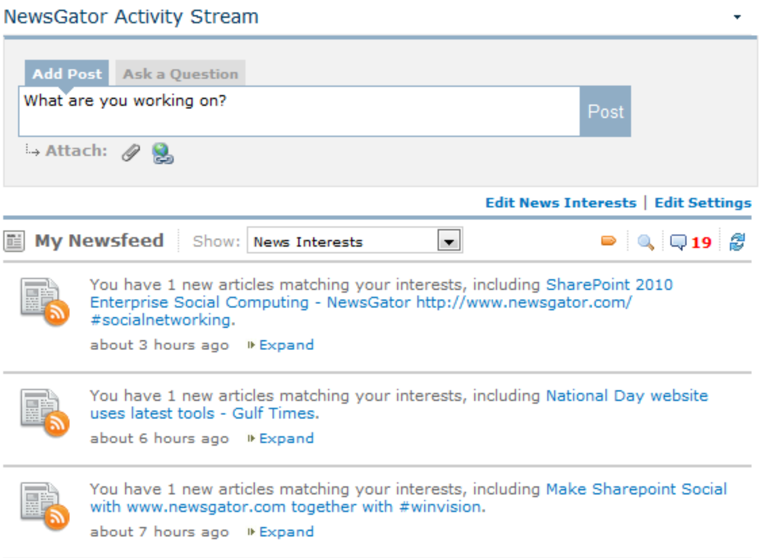
It is possible, as in the example below, that multiple new articles match the user's interests. In this case, the event lists the title of one of the articles


When the user clicks **Expand**, the event expands to show a list of articles (including a scroll bar if needed).



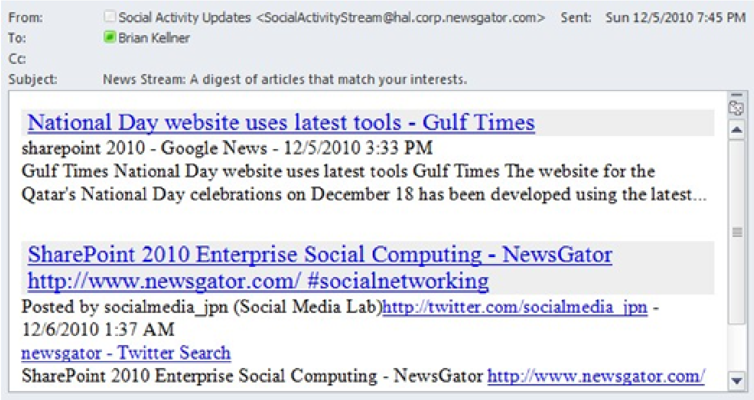

*Screenshot 917: Expand / Collapse events*

Users also have a filter in the Activity Stream web part on the **My Newsfeed** page to show only news events.




## 1.55.2 Emailed News stories

The screenshot below shows an example of the digest output. The headlines of stories are clickable to allow users to see the full story.

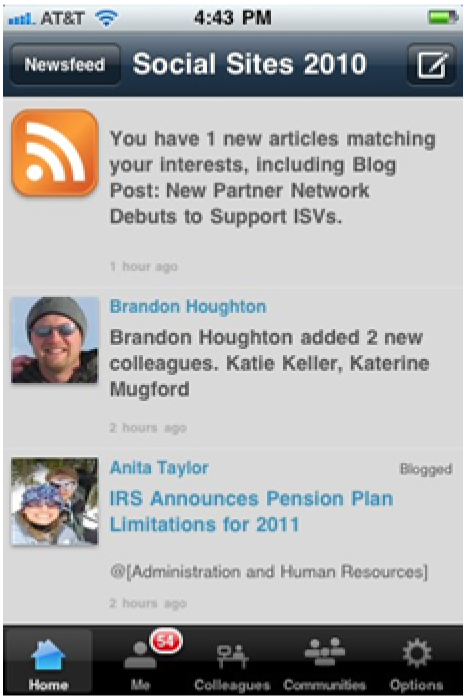

From: Social Activity Updates <SocialActivityStream@hal.corp.newsgator.com> Sent: Sun 12/5/2010 7:45 PM
To: Brian Kellner
Cc:
Subject: News Stream: A digest of articles that match your interests.

National Day website uses latest tools - Gulf Times
sharepoint 2010 - Google News - 12/5/2010 3:33 PM
Gulf Times National Day website uses latest tools Gulf Times The website for the Qatar's National Day celebrations on December 18 has been developed using the latest...

SharePoint 2010 Enterprise Social Computing - NewsGator http://www.newsgator.com/ #socialnetworking
Posted by socialmedia_jpn (Social Media Lab)http://twitter.com/socialmedia_jpn - 12/6/2010 1:37 AM
newsgator - Twitter Search
SharePoint 2010 Enterprise Social Computing - NewsGator http://www.newsgator.com/

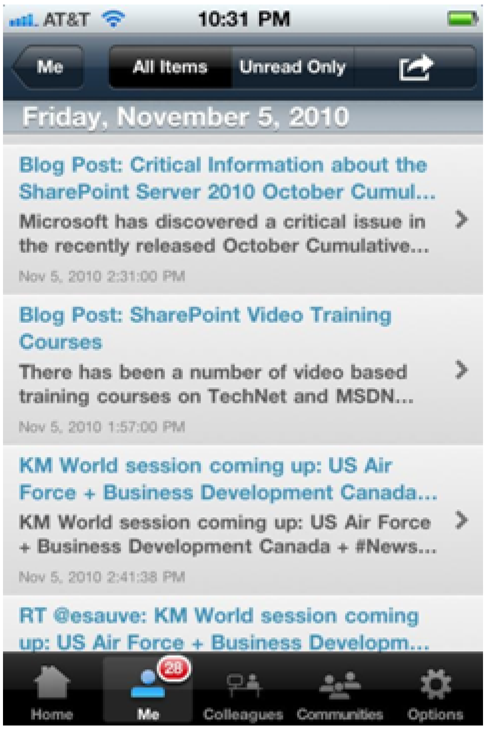
## 1.55.3 Mobile Access

Because the news events are part of the **Activity Stream**, NewsGator mobile clients like the iPhone and iPad Aurea Social clients can display them.




*Screenshot 918: News events on iphone/ipad*

The iPhone and iPad clients also include the ability to display all the articles and show the full view of an individual article.




Screenshot 919: All articles displayed

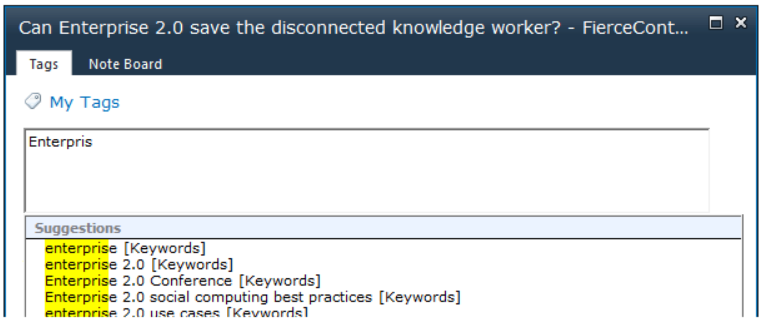

Screenshot 920: Full view of an article

## 1.55.4 Interactions

All the News Stream article displays within SharePoint allow access to the SharePoint tag and note control and easy sharing via the activity stream.

#### Tag It

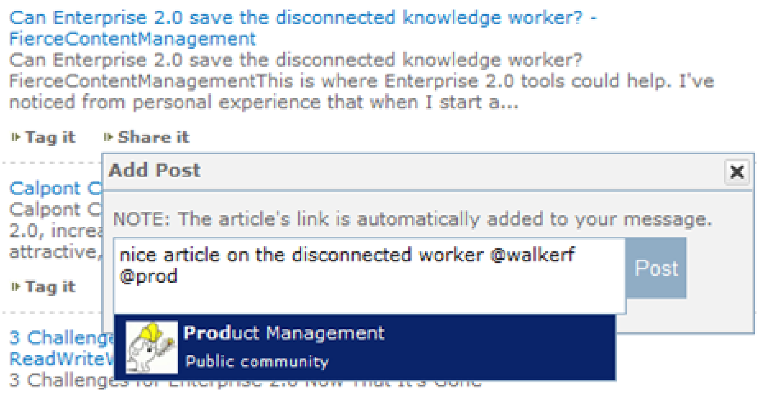
The **Tag It** link brings up the SharePoint control used for adding tags and notes to links. The story link is automatically selected, so the user simply enters a tag and/or a note. This SharePoint control supports auto- completion of tags as shown below.




*Screenshot 921: SharePoint control for adding tags and notes to links*

**Share It**

The **Share It** link displays a text entry box where the user can add commentary and also direct the link to specific users or groups (exactly like a microblog message including the auto-completion behavior). The link to the story is automatically pasted into the message.




## 1.56 Spotlight module

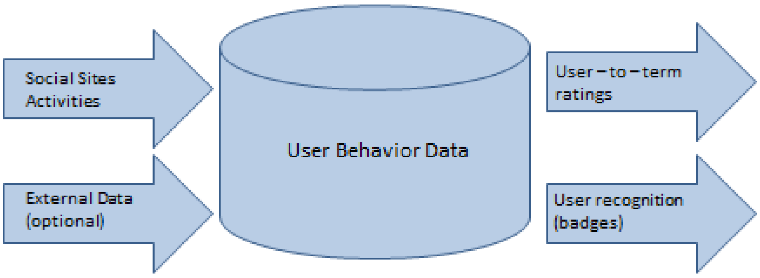
### Overview

The Spotlight module for Aurea Social provides a pair of related features that both use user data in the system to illuminate skills and expertise as well as to guide, measure and display desired user behavior.

Spotlight is an optional module which integrates tightly with, and requires the functionality of, the base Aurea Social product.

The basic concept is illustrated below. Data is collected by Aurea 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 (the expertise functionality). It's also used to determine how a user is performing relative to set of goals for behavior (the Recognition functionality).




The expertise feature maps users to tags or terms. The Recognition feature measures levels of user behavior in specific areas and marks progress with badges after sufficient progress is made.

## 1.56.1 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
- Interests

Administrators can add other profile properties to this list, so long as those properties contain lists of text strings as their data.

As 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** - 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
- Tag SharePoint content

» **passive** - 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.

## 1.56.2 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 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

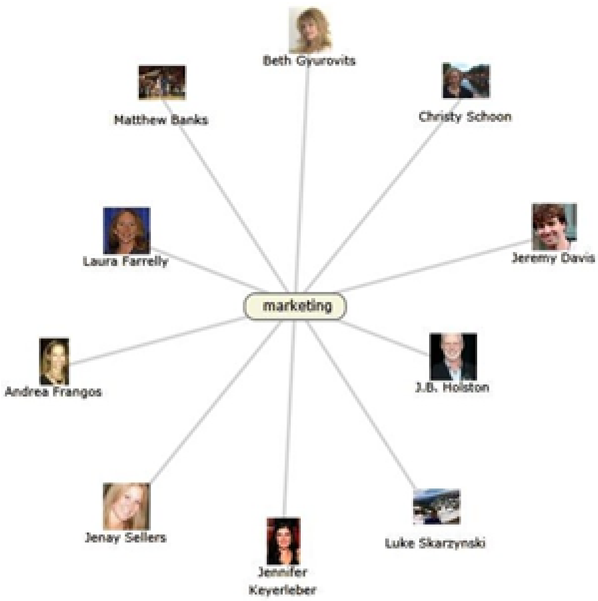
Only the HTML5 version is available in the web part gallery for deployment; however those with the Silverlight version installed will find that it works the same as before.

The **Expertise Browser** web part allows users to navigate through the expertise data in an unstructured pattern. It requires extra steps to deploy properly.

The view begins with the top 50 highest scoring tags in the system arranged alphabetically and sized by overall score.


*Screenshot 922: 50 highest scoring tags*

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).




*Screenshot 923: Users associated with a tag (marketing)*


*Screenshot 924: Tags associated with a user*

Click on any user image in this view to re-center 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.

Click any tag to re-center the view on that tag (left, above). Proceeding this way, you can continue switching between tag-centered and user- centered views.

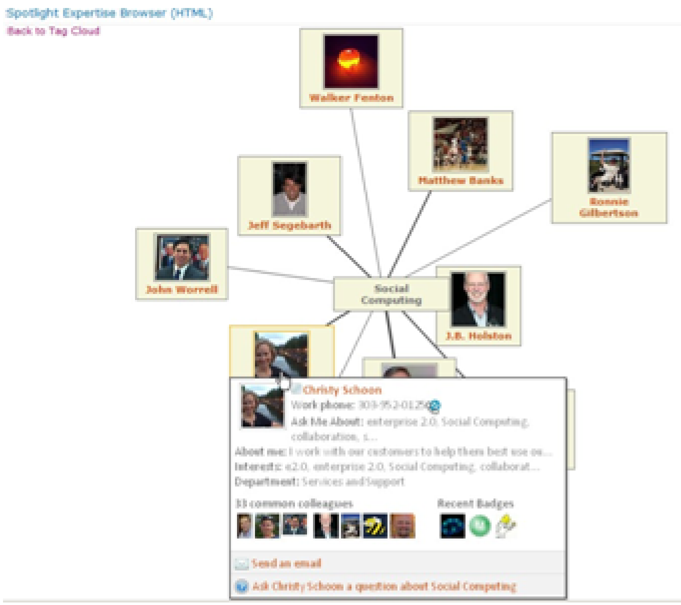
This can be an effective way to find a person who has expertise on a particular topic. When you have done so, it will be natural to want to ask that person a question.

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 is 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 has 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 takes 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 is displayed with his or her top tag, and clicking on the user shows 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.

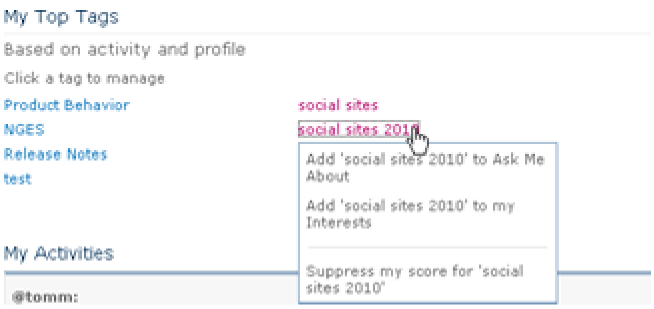
Often this web part is displayed directly adjacent to the SharePoint **Ask Me About** web part on the user's profile page, and when Spotlight is first installed the lists of tags displayed in these two web parts will usually look very similar.

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 is 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 shows 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.

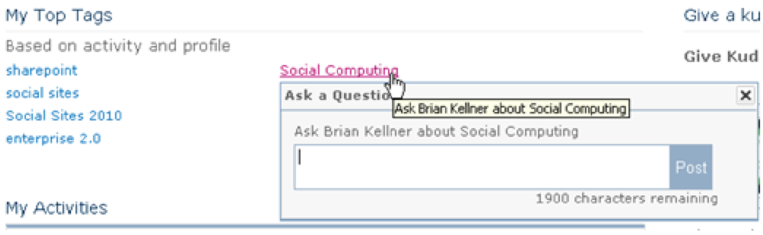
» Add to my **My Interests**. This adds the tag to the My Interests list in the user's SharePoint profile. This will let others find the user more easily in People Search.

» Suppress my score for this tag. This removes 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 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**.




*Screenshot 925: My top tags*

## 1.56.3 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.


*Screenshot 926: Click endorse*

When a user clicks the **endorse** button, the following happens:

- the user who is being endorsed gets a post in his or her stream saying that they were endorsed for that tag.
- 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).


*Screenshot 927: In this example, Jon gets +10 points for "New Zealand" expertise*

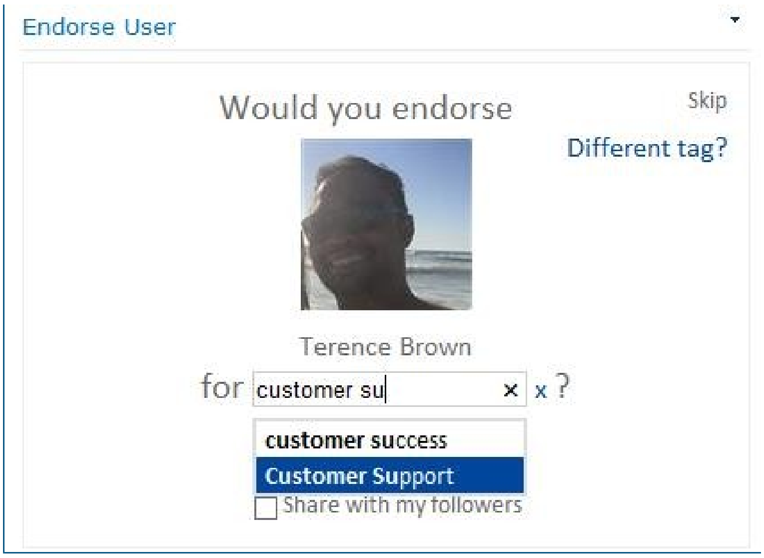
If the endorsing user clicks the, **Share with my followers** checkbox, a microblog is created in the activity stream which is visible to everyone who follows the endorser.


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:**
> 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.



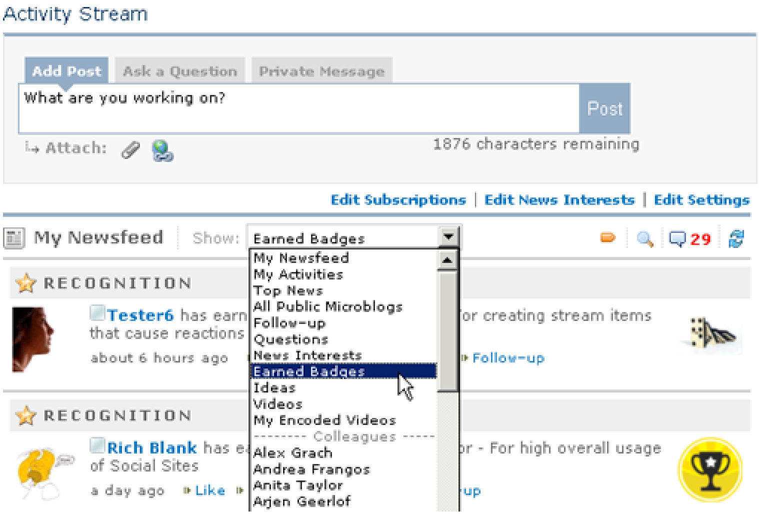

## 1.56.4 Recognition feature

The **Recognition** feature rewards certain user behavior or recognizes special milestones with a badge. Different badges reward different behaviors or recognize different milestones.

## 1.56.5 Viewing badge possibilities, progress, and awards

#### Via Activity Stream

Badges your colleagues earn will appear in your activity stream, under a **Recognition** header. You can filter to see all the badges that others have earned by selecting the **Earned Badges** filter.



*Screenshot 928: Activity Stream*

**Via Recognition web parts**

There are three web parts for viewing awarded and available badges:

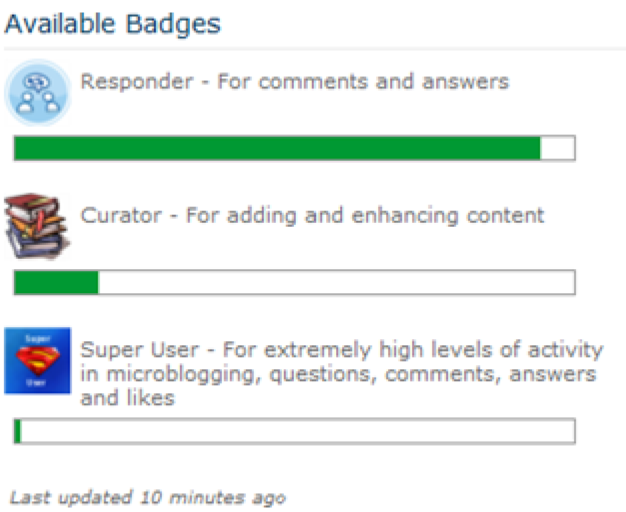
- Available Badges
- Earned Badges
- Leader Board

## Available Badges web part

The Available Badges web part shows the viewing user the badges they have not yet earned by any of the currently active and visible scoring rules. With each of these it graphically displays the user's progress toward that badge.

This web part will typically go on a personal viewing area for the user, but could go on any public page. It always shows the status for the viewing user.

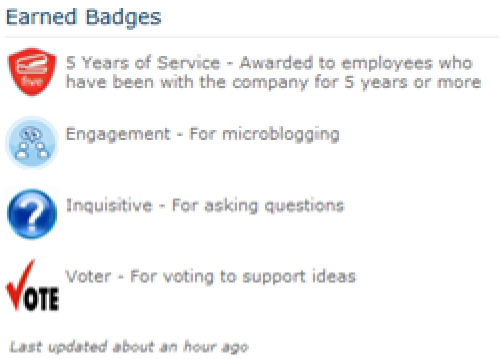
Hovering over badge displays a tooltip which is the description for the scoring rule to earn that badge.



*Screenshot 929: Available Badges*

## Earned Badges web part

Earned badges is intended for display on the users My Profile page. It shows the badges which this user has been awarded, on display for anyone visiting the page to see.

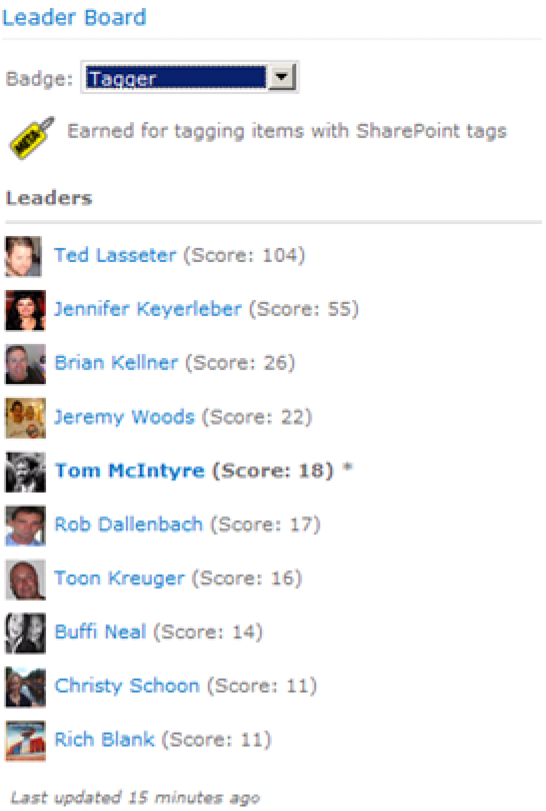


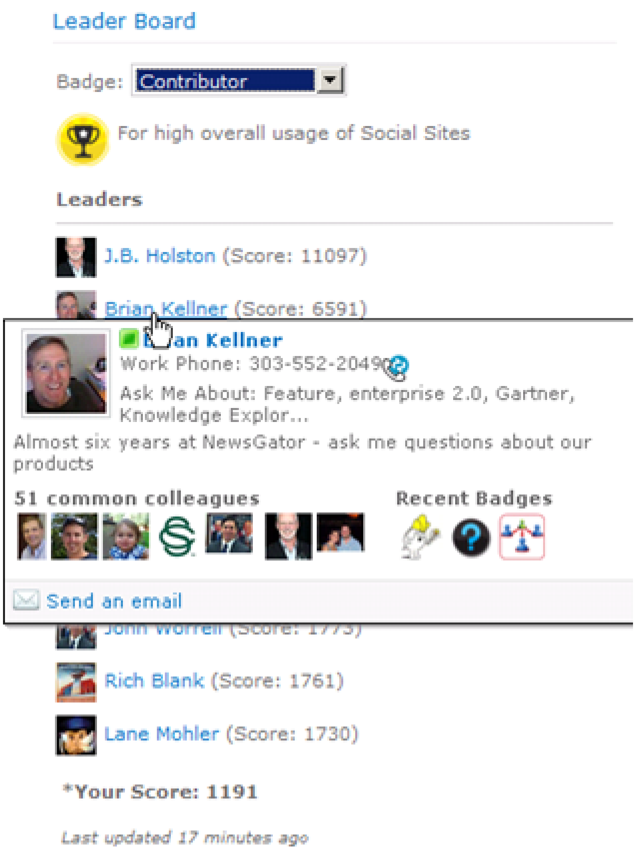

*Screenshot 930: Earned Badges*

### Leader Board web part

The **Leader Board** web part lists the top-scoring users under a particular rule, regardless of whether they have passed the threshold for earning the badge under that rule or not. Highest scorers show on top.

This web part typically goes on a public page.




A dropdown listing available rules allows the user to change which rule is displayed (rules for which the "Show in Leader Board" property is turned off are not displayed for selection).

When your score is among the leaders for a particular badge, your entry in the Leader Board is displayed in bold and given an asterisk, making it easier to compare your progress against those of your peers (pictured above left).

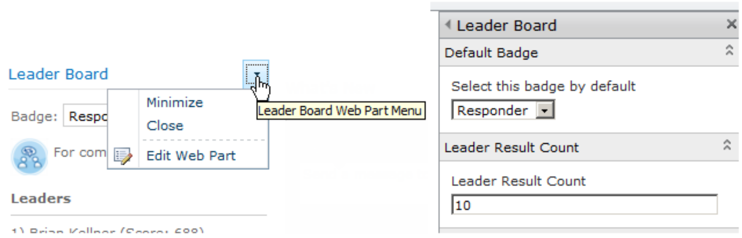
When your score is not among the leaders, your score is displayed below those of the leaders (pictured above right) to give you a better idea of your standing.

(This positioning should not be taken to indicate that your rank is 11th; there may be many others scoring between yourself and the last "leader" for a given badge.)

User names displayed in the **Leader Board** web part are links that on mouseover pop up a miniprofile (pictured abovet). On click, they navigate to the user's profile page.

To set which rule is displayed by default when the page loads, open the web part menu and select **Edit this web part**.

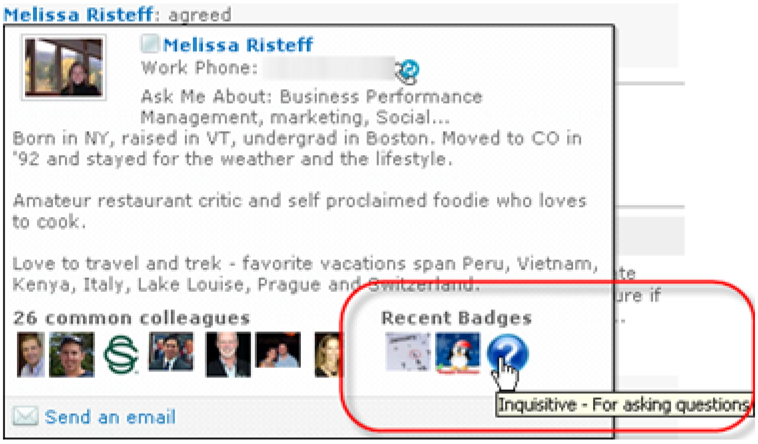
The top item in the Leader Board settings is a drop down titled **Select this badge by default**. Make your selection here and click **OK**




The number of users to show on the leader board can be changed using the web part's Leader Result Count property, also available via the **Edit this web part** menu option. This defaults to 10.

#### Via mini profile display

Icons for three of each user's earned public badges appear in their mini-profile, in the bottom right corner (pictured below left), and near the bottom of their Expertise Browser profile (pictured below right).





In the **Expertise Browser** profile, badge titles are displayed below the icons. In the mini-profile, when you drag your mouse pointer over any of these badges, the badge name and description are displayed in a tooltip.

## 1.56.6 Viewing Community Badges

**Viewing a community's badge leaders**

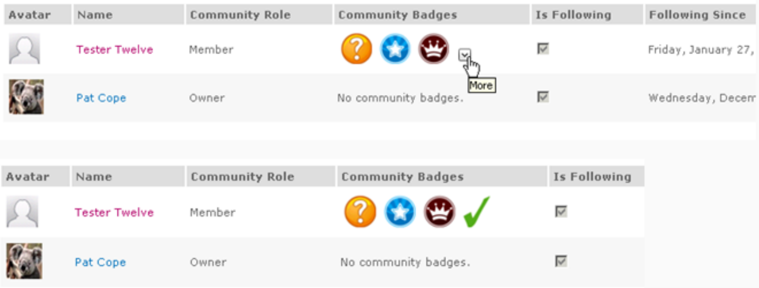
There is a community version of the Leader Board web part. When deployed to a community, it only shows badges earnable by rule in that community. The existing (global) leaderboard web part only shows global badges, no community badges.

**Viewing community users' badges earned**

There is no community version of the Earned Badges web part. Instead, community badges earned by a particular user can be viewed by finding that user on the **Members** tab of the community (accessible from the Members web part even if the Members tab isn't displayed).

When Spotlight is installed, there will be a Community Badges column in the **Members** tab that shows icons for the last three community badges that the user has earned from that community.

If there are more than three badges to be displayed, a shows (as pictured below) that can be clicked to show all the user's badges earned within the community. Hovering Mouse over the badge icon displays the name and description of the badge earned.




Other places that earned community badges can be seen include the community activity stream. Community followers can see community badge-earning events in their activity streams on their My Sites.

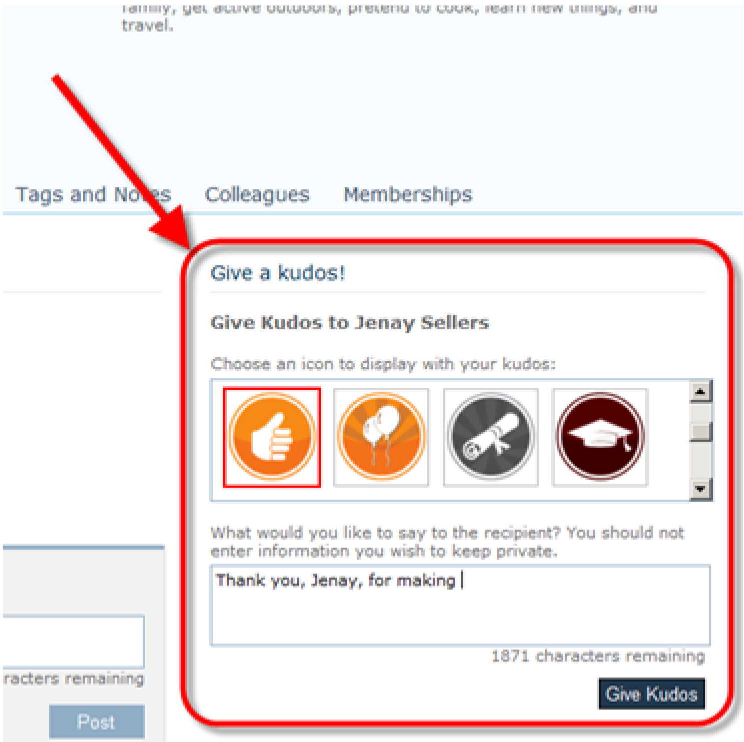
All users can find a user's earned community badges on the Earned Badges web part on the user's profile page, and in the user's mini-profile.

There is no information identifying the community in these cases, however, unless the community is identified in the badge name or description.

## 1.56.7 Direct User-to-user (Kudos) badges

There is a new 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 appears in the activity stream for that person and her followers, alongside whatever icon you chose to use.

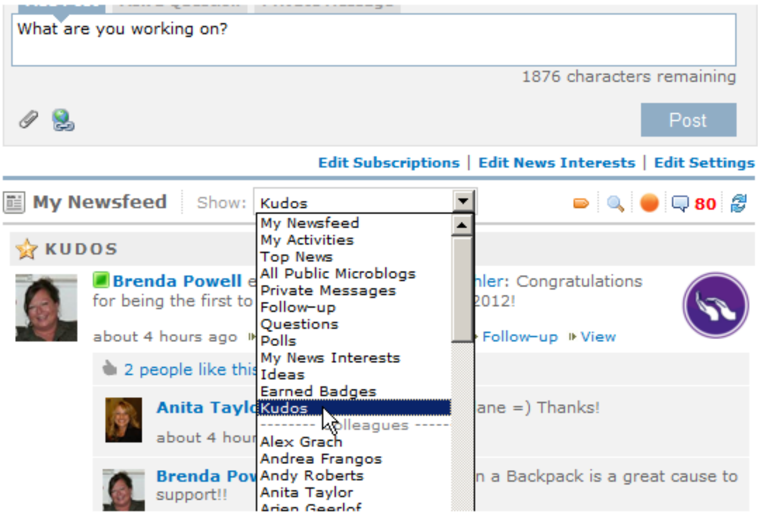

There are a set of 14 icons available by default for use with in kudos. Spotlight administration can make any changes they wish to this list via the global Spotlight Management page, by adding new badges and marking them as kudos badges, or by removing existing kudos badges.

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).

> **Note:**
> As of the 5.1 release, there is now a web part which may be placed anywhere and which allows a user to select another user from within the web part and send a kudos badge.

#### Viewing Earned Kudos

You can see all kudos that have been awarded by selecting the new Kudos filter in the **Activity Stream** web part.

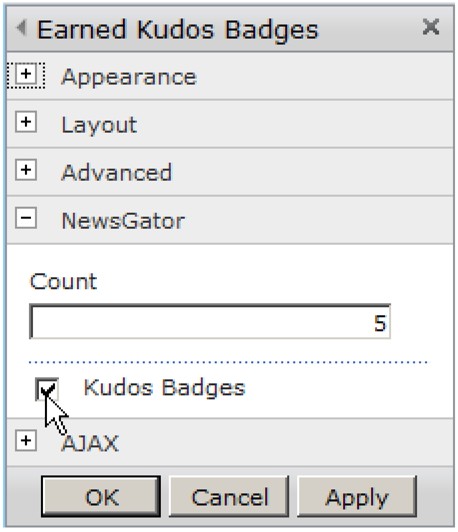



*Screenshot 931: All awarded kudos*

### Earned Kudos Badges web part

You can also see the kudos that you or another one person has earned by viewing the Earned Kudos web part. It needs to be placed on the public profile page for you to see others' earned kudos.


*Screenshot 932: Earned Kudos Badges*




*Screenshot 933: Enable Kudos Badges checkbox*

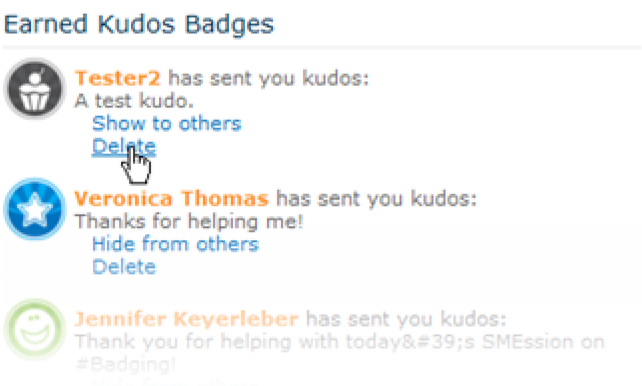
The Earned Badges web part can be turned into an Earned Kudos web part by checking the **Kudos Badges** checkbox in the NewsGator section of the web part settings.

#### 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 is also removed – but only if the event occurred after upgrading to version 4.0 (or higher) of Aurea Social.



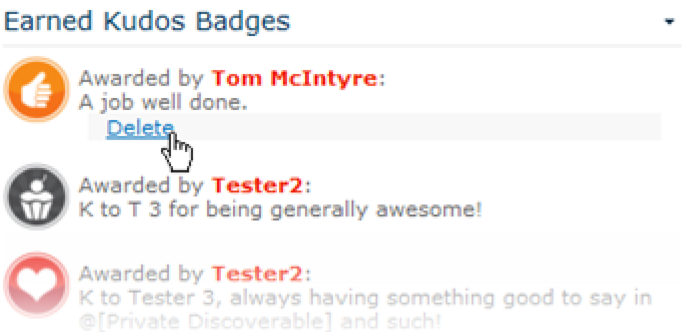

*Screenshot 934: Click Delete*

As was previously possible, you can also delete the activity stream event that announces the award of the kudos badge, but doing so does 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 Aurea Social.




*Screenshot 935: Click Delete*

#### Hiding your badges and kudos from others

You can hide any regular badge or kudos badge you have received, or opt to pre-emptively prevent anyone else from viewing any of the badges or kudos that you will earn (or have earned).

These options are described below in the section titled **Options for Display and Hiding of Badges**.

## 1.56.8 Options for Display and Hiding of badges

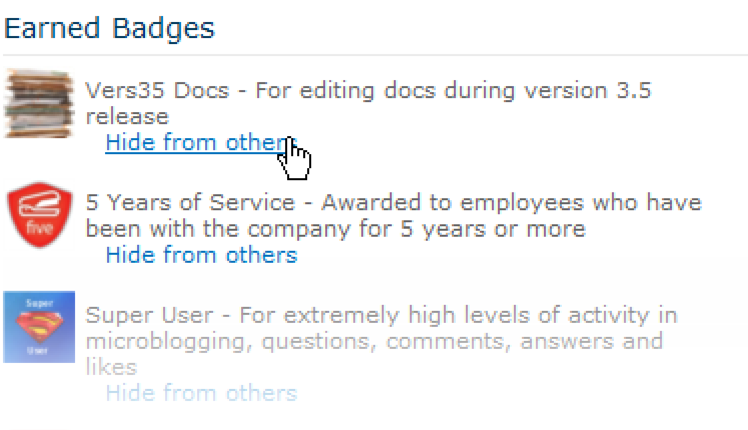
#### Hiding individual badges and kudos that you have received

You can hide any regular badge or kudos badge you have received, by clicking the new "Hide from others" option below the badge in the Earned Badges and Earned Kudos Badges web parts on your own profile page.

Others visiting your profile do not see any badges you have hidden, but you can see them.

Hiding can be reversed by clicking the **Show to others** option, which replaces the **Hide from others** option once the badge is hidden.

The activity stream event announcing the award of the badge or kudos will still appear while the badge itself is hidden.



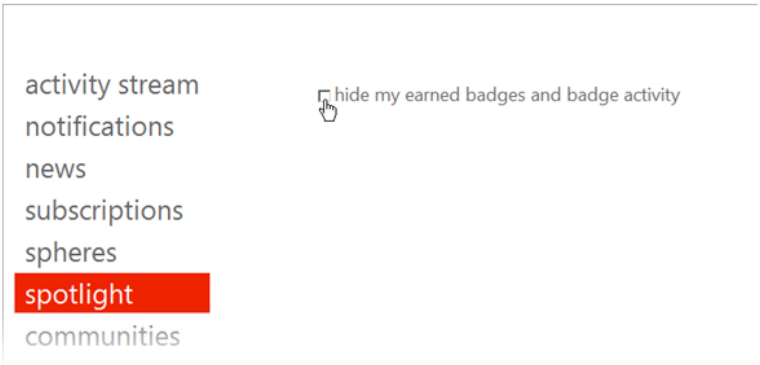

*Screenshot 936: Click **Hide from others***

#### Hiding all badges and kudos you've earned, and leaderboard progress

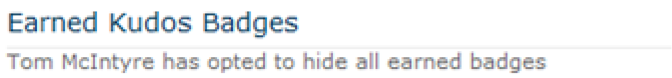
You can prevent anyone else from viewing the badges you've earned, be they kudos badges or regular badges. Only you will see the badges you have earned (except that Spotlight Administrators can see them in the administration area). You will not be listed on any Leader Board web part.

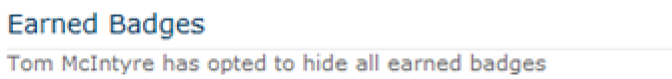
To take this option, do the following:

1. Open your Settings dialog and go to the Spotlight page.
2. Check the **hide my earned badges and badge activity** option.




After you check this, others visiting your profile will see messages stating that you have opted to hide your badges.




You see reminders that you've opted to hide your badges when viewing your own profile page, but you can see your own badges.

Activity stream events announcing your badge awards that occurred before you turned on this setting will still appear; however, after you have taken this option to hide all badges, no further activity stream events will be created as you receive new badges.

## 1.57 Video Stream

### Overview

The Video Stream module for Aurea Social provides the ability to upload large videos, discover the most popular ones and view them inline in the activity stream.

Most of the common input video codecs are supported and are encoded to provide an HD viewing experience up to 1080p (depending on quality of video uploaded) in the browser.

Using Microsoft's Smooth Streaming technology, the individual user's video playing experience is optimized for the current network bandwidth and client performance. Video Stream also supports an a progressive download format for mobile and the browser.

Video Stream also supports mobile options through the Aurea Social iPhone client as well as HTML 5.0 support.

Video Stream is an optional module which integrates tightly with, and requires the functionality of, the base Aurea Social product.

## 1.57.1 Deploying the Video Stream

There are three main use cases for the Video Stream module:

» The first use case is the video center or “internal YouTube ©” scenario where a video-specific community is created to support a centralized location for the uploading, discovery and viewing of videos. This is ideal for sharing videos with an audience that spans many communities like a video learning site.

» The second use is adding a video sharing and discovery capability to an existing Aurea Social community.

» The third case is adding a Video Stream to a default SharePoint site.

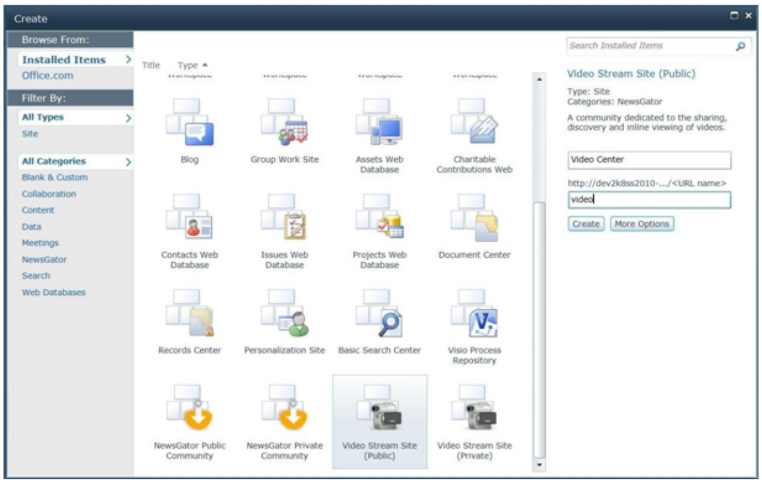
Whether the Video Stream is deployed in its own community or in a community or site with other kinds of content, it is intended to encourage the sharing of relatively short and informal videos.

The Video Stream is not intended to replace an enterprise-class video streaming solution that supports features like multi-cast but could potentially be integrated with one.

For further details, see the Third-Party Video Integration section.

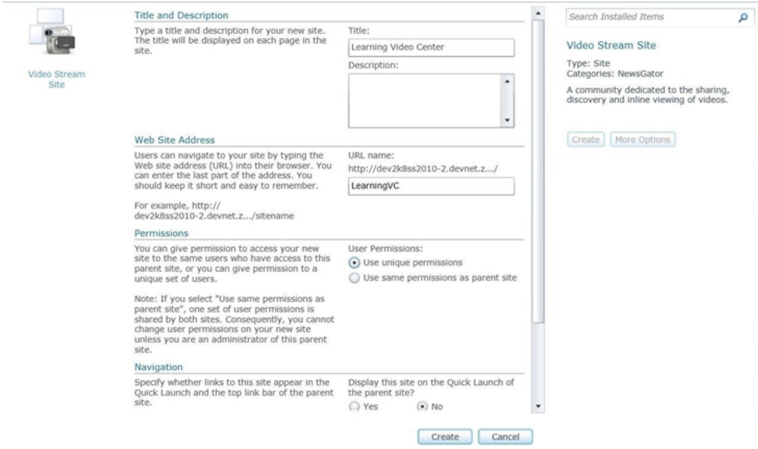
#### Creating a stand-alone video community

Deploying the Video Stream as its own community is similar to creating a Aurea Social community. After choosing to create a new site, the Admin sees an option to create a Video Stream site. You can create a public or private community.



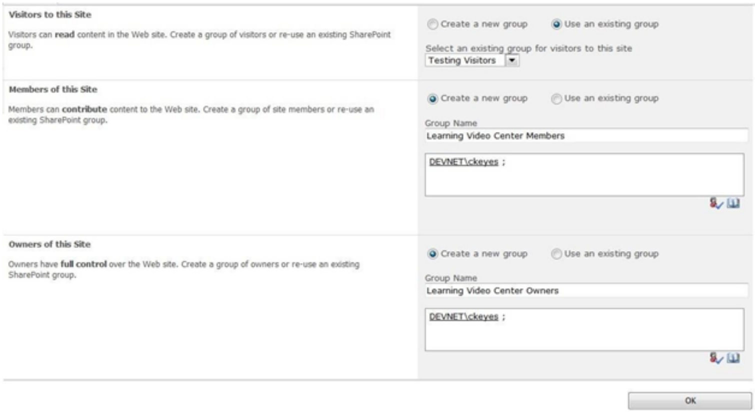

*Screenshot 937: Option to create a Video Stream site*

> **Note:**
> If you create a private Video Stream and want to configure what groups have access, click **More Options** and configure permissions accordingly.



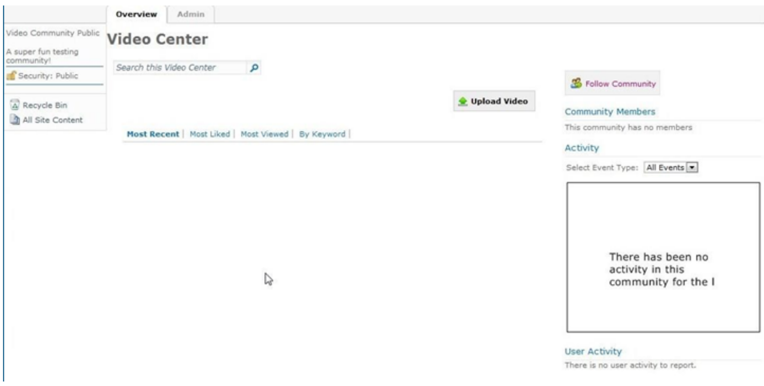

*Screenshot 938: Enter the details*

Make sure to include your user in the groups to have access to the site.




Once the creation process is complete, you will have a Video Stream site ready to be customized for your needs.

It should look something like the screen shot below (after a couple of videos have been added).



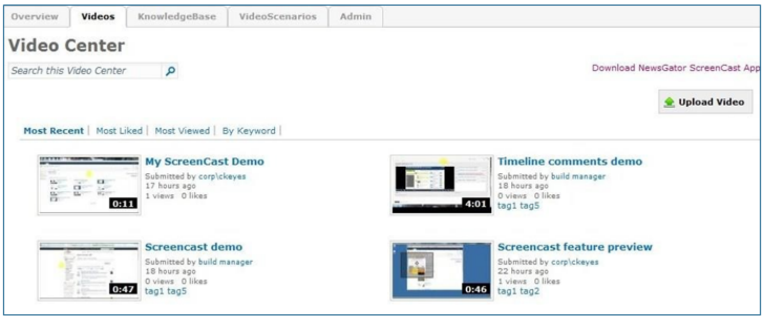

**Adding video capability to an existing Aurea Social community or other SharePoint site**

Since the Video Stream capability is intended to encourage “grass roots” video sharing, the community is an ideal place to deploy it.

When the Video Stream module is installed on the SharePoint farm, community administrators can activate the NewsGator Video Stream site feature in Site Settings: Site Features.

When the video feature is enabled for a regular Aurea Social community, a Videos tab is added to the navigation (if the NewsGator Master Page is being used).

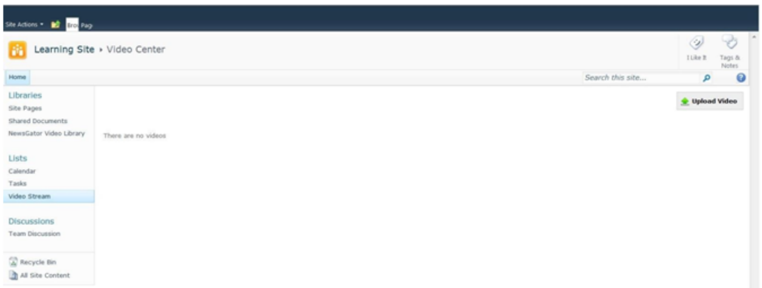
From this tab, users with the right permissions can upload and browse videos. If you activated Video Stream for a community this is what it might look like (after a number of videos have been added).




Below is what an up-loaded video will look like in the Activity Stream in the community:

When the video feature is enabled for a default SharePoint site, a **Video Stream** quick link is added to the navigation.

Below is an example of what this might look like right after you have enabled the Video Stream feature (and once you've clicked on the Video Stream quick link).



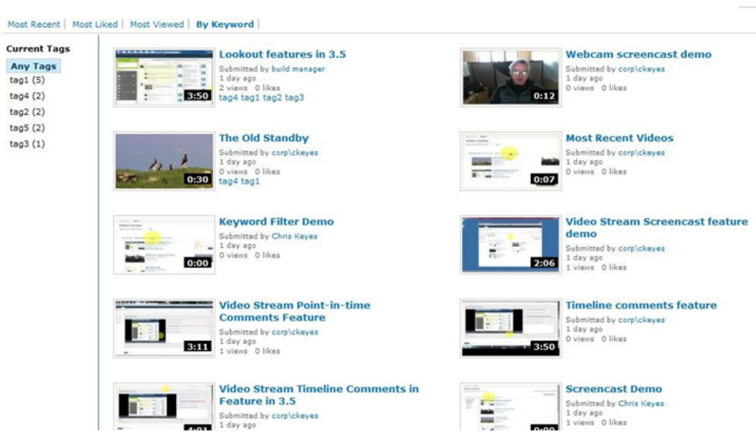

## 1.57.2 Using Video Stream from the browser

Whether deployed as a video-only community or as a videos tab in an existing community, the features of the Video Stream module are the same. The video "home page" for both scenarios is referred to below as the "videos tab/page".

### Browsing videos

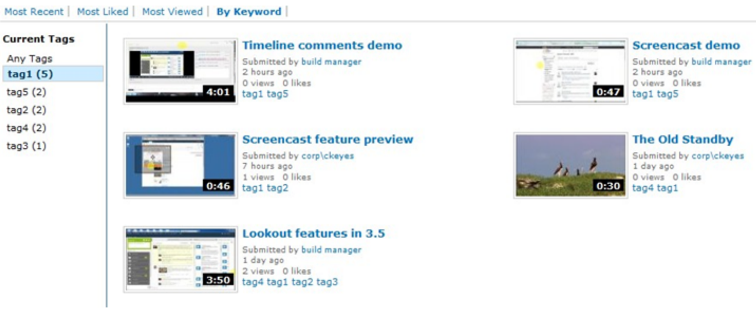
From the videos tab/page the user can browse videos by the most recent (default), most liked, most viewed and by keyword.

Click on the **By Keyword** filter to show all videos and a list of the 50 most popular tags.

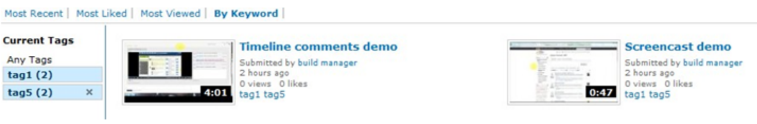



*Screenshot 939: By Keyword filter applied*

Click on a specific tag to refine the list to videos with that tag. It also displays the tag breakdown of the refined list.




Clicking on a yet another tag refines the list further (with a subsequent option to deselect by clicking on  ).

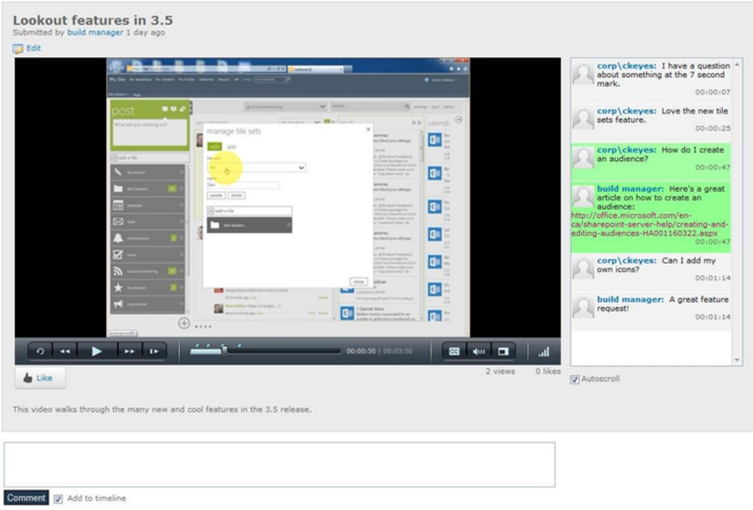



Clicking on a video thumbnail or video title takes the user to the individual video page where it can be viewed inline.

The video page has a number of key components including the video player, timeline comment viewer and commenting area. The image below shows the SilverLight video player with a standard feature set.

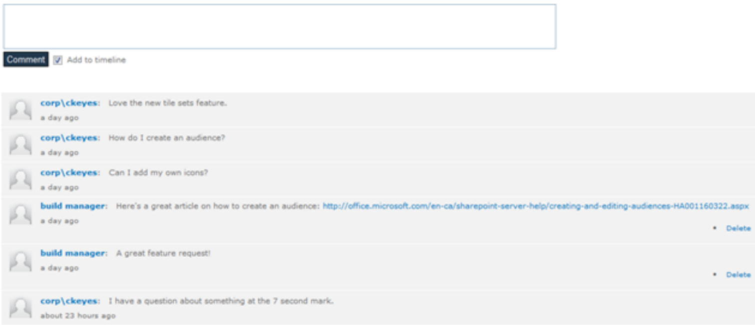
To the right of the video player, is the timeline comment viewer. If a comment is added from comment box below the video player and the **Add to timeline** box is selected, the comment shows up in the timeline viewer.

Comments in the timeline viewer are shaded proportionally to their proximity to the current time position in the video. There are triangular markers on the scrubber to indicate where the timeline comments are.




Any comments users make also appear in a stream-like view below the comment entry box. These comments will also appear in the activity stream with the corresponding video.

> **Note:**
> The comments in the stream-like view appear in the order in which the users added the comments (versus the timeline comment viewer which displays them in the timeline order).

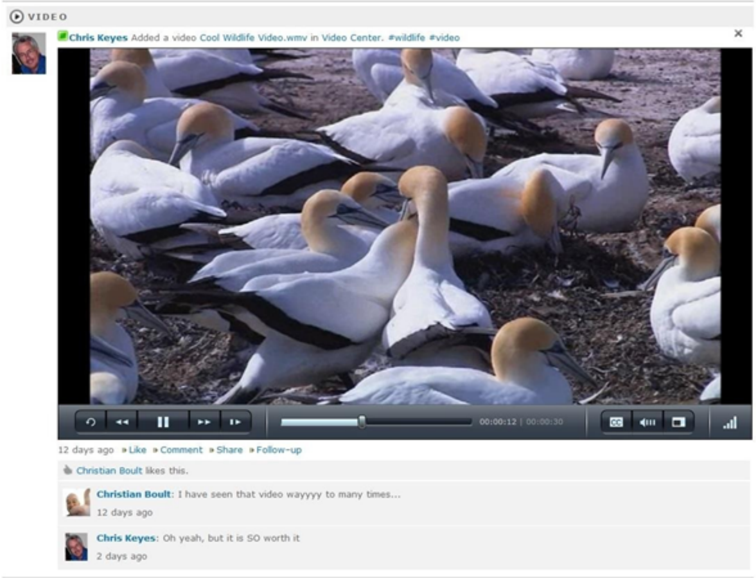



## Interacting with videos in the Activity Stream

Videos with their likes and comments will appear in the stream of anyone who is following a Video Stream site or a community that has the Video Stream activated.

Videos will also appear in the community activity stream of the community the video was created in. Videos in the stream can be viewed inline by clicking on the thumbnail.

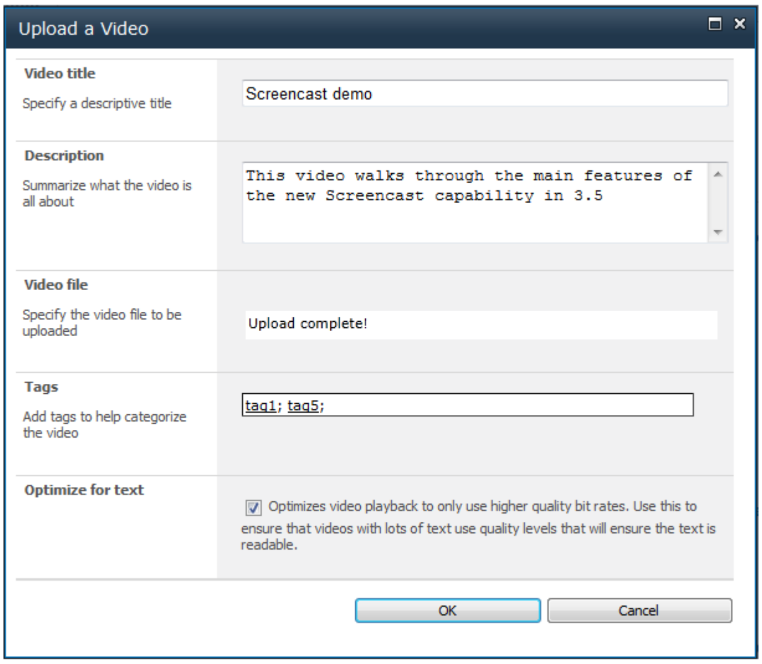
Any likes or comments on a video created from the activity stream will appear on the corresponding individual video page (and vice-versa)



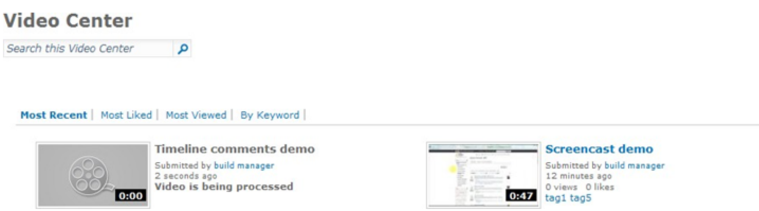

## Uploading a video

Users can upload videos by clicking on the Upload Video button on the videos tab/page. Users are prompted for a title, description, the video file itself and tags.

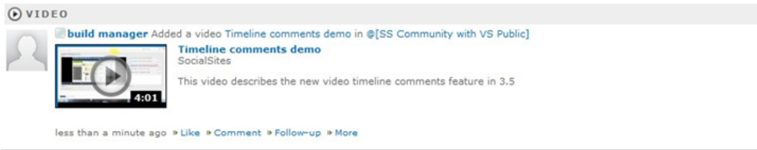
We recommend that users select the **Optimize for text** option for text-intensive demos.




The system will notify the end-user via their activity stream once the file has been encoded (or will report an error in the stream if it the encoding was unsuccessful). As well, the Videos tab will indicate the video is being processed:




Once the video has been encoded, it will appear in the Videos tab and in the stream as seen below.




Videos can also be uploaded by adding them to the Newsgator Video Library directly. This will use the document loading process that comes with SharePoint.

The uploading mechanism that comes with the Video Stream module (i.e. Upload Video on the videos tab/page) has a number of additional features including an upload progress bar, more robust support for uploading very large files and verification of file properties before attempting to upload.

Uploading to the list directly follows a similar process i.e. the original video is added to the Newsgator Video Library and the user is notified via the activity stream once the encoding is complete.

The advantage of using the default SharePoint up-loader is that it allows you to up-load multiple video files in one upload operation.

### Editing a video

To edit the properties of a video including replacing the video or thumbnail, go to the individual video page and click on Edit Video.

The workflow that follows is very similar to adding a video. If the edit includes changing the video itself, the video on the videos tab/page shows the previous version until the re-encoding has completed.

The user that submitted the video will be notified via the activity stream once it has been re-encoded.

Videos can also be edited from the Newsgator Video Library. This will use the document editing process that comes with SharePoint (following a similar process as described in the upload process above).

If the edit includes changing the video itself, the video on the videos tab/page will show the previous version until the re-encoding has completed. The user that submitted the video will be notified via the activity stream once it has been re-encoded.

> **Note:**
> In the default setup videos are cached for two hours and so a change to a video may not appear for up to a maximum of two hours.

### Deleting a video

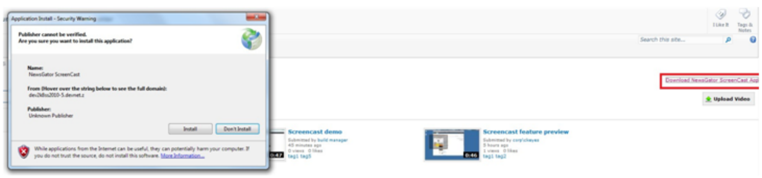
To delete a video, go to the Newsgator Video Library and follow the typical SharePoint process for deleting library items.

### Creating a screencast

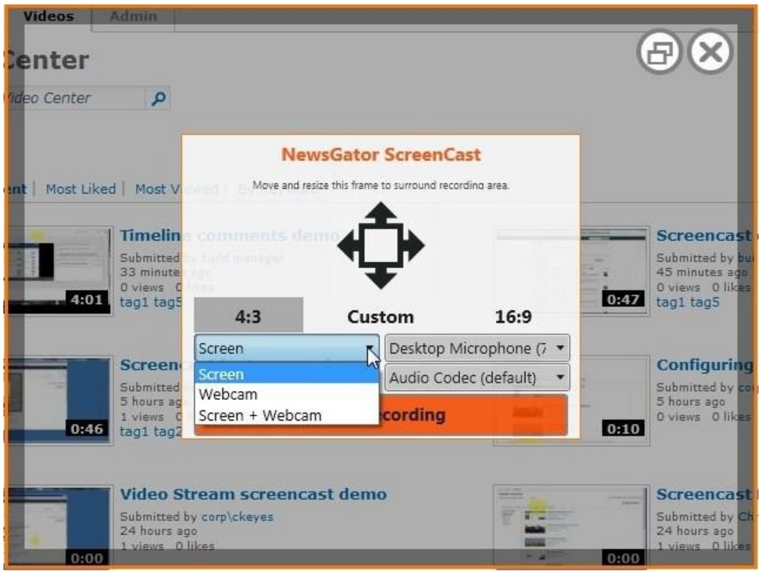
Video Stream supports the creation of a screen session or "screencast" by the end user. The screencast feature is an application that is installed on the user's computer.

To enable this feature activate the NewsGator ScreenCast feature in Site Settings: **Site Features**.

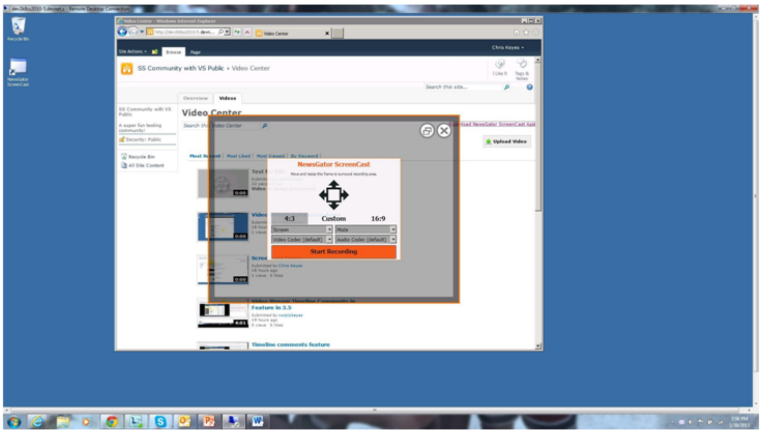
Once the feature is activated the **Download Newsgator Screencast App** appears above the **Upload Video** link. Clicking on it prompts the user to install the application.

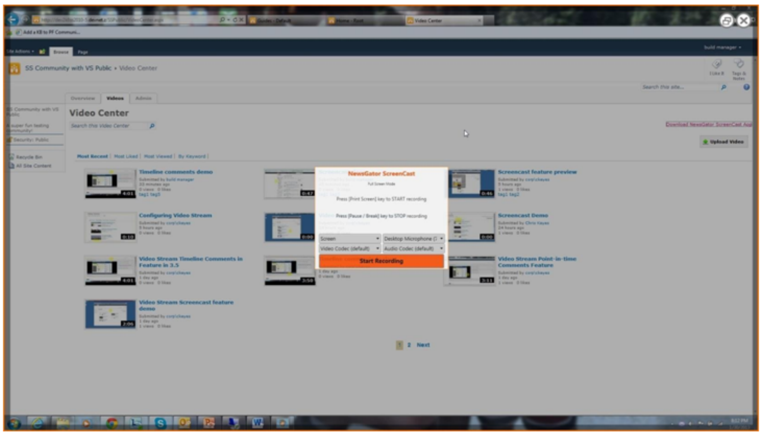


After installation the Screencast main screen pops up. The Screencast feature has many options including aspect ratio, recording options (screen, webcam, screen + webcam), microphone used (or mute), video and audio codec.




The user has the option to drag the Screencast window over the desired recording area or to use full screen mode (see icon in upper left-hand corner). Both examples are seen below.

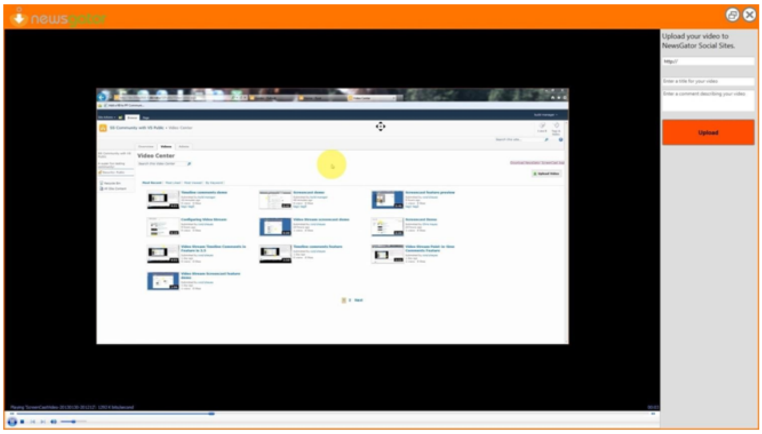




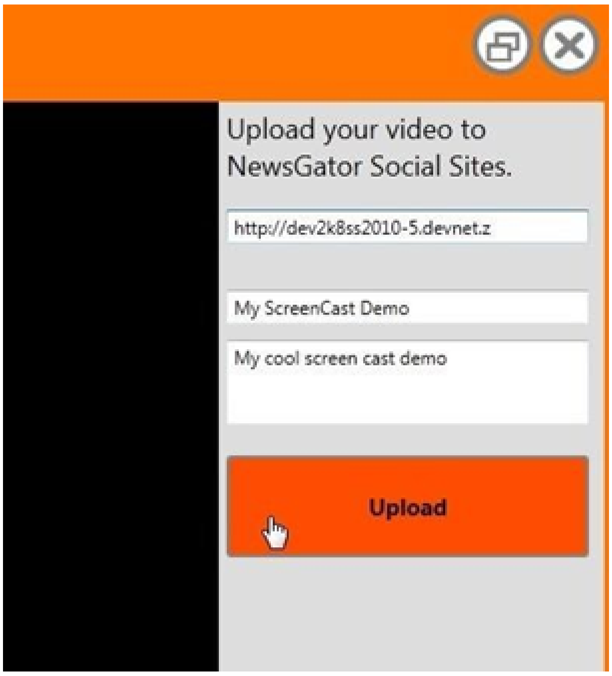
To start a recording, click on **Start Recording** which shows a countdown before the recording actually starts.

Recording can be stopped by using the Pause|Break key or the **Stop Recording** button in non full-screen mode (See Screencast Hot Key Support for the complete range of hot keys).

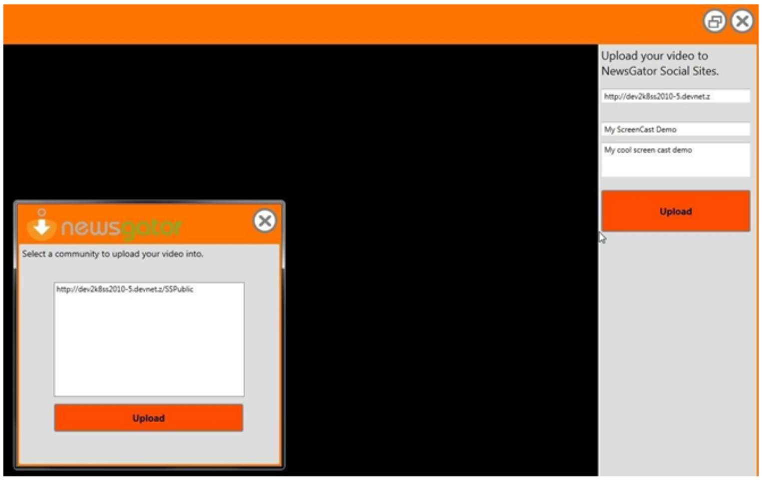
When the recording stops, the Screencast viewer appears and plays back the video. The yellow-filled circle indicates the cursor action.

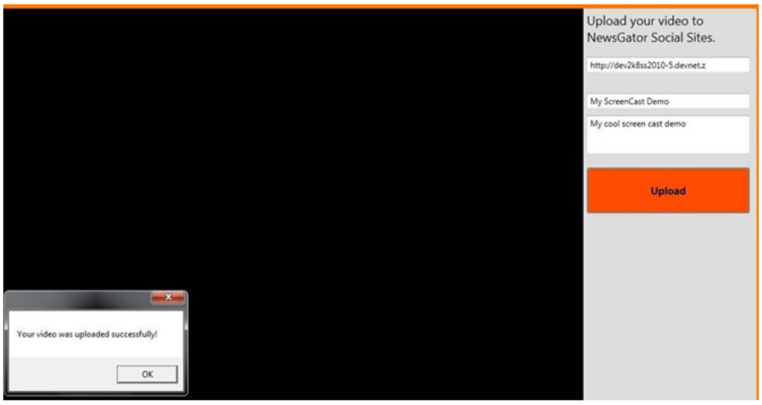


If the user is happy with the recording, she can upload it by specifying the name of the site to upload to (will store initial entry as default), the title, the description and click on **Upload**.




Screencast will then prompt the user for the community which will list all communities that have Video Stream installed that the user is following. The system confirms that the upload is successful. The video will then appear with all of the other videos in Video Stream.




> **Note:**
> If you are running Basic Authentication, you will not be able to download the Screencast application. For a description of a workaround, see Deploying Screencast with Basic Authentication.

## Embedding and viewing external videos in the stream

Often communities want to share a video that is stored in another system and have a conversation it. To support this, Video Stream supports the embedding of certain third-party videos in the stream.

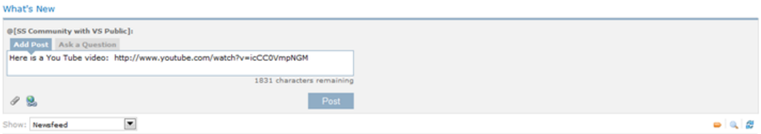
These embedded videos can be viewed inline, commented-on and liked. Video Stream supports the embedding of YouTube ©, Qumu ©, SlideShare ©, Video Stream and Kaltura © videos in the stream.

In most cases, embedding the video (or slide deck) is a simple as copying the URL of the individual video page into a micro-blog post.

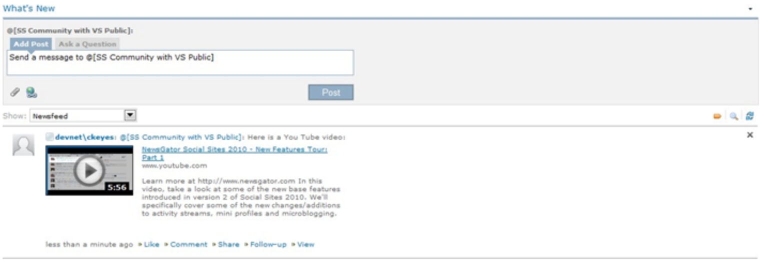
Kaltura videos require an extra couple of steps and are described in Embedding a Kaltura Video in the Stream. Video Stream also supports videos streamed via MMS (Microsoft Multimedia Service). In this case, Video Stream will play the video with the Windows Media Player.

For example, see Embedding an MMS video in the stream.

To embed a YouTube©, Vimeo©, SlideShare©, Qumu, Kaltura or Video Stream video (from another community, for example), copy the URL into a micro-blog post.

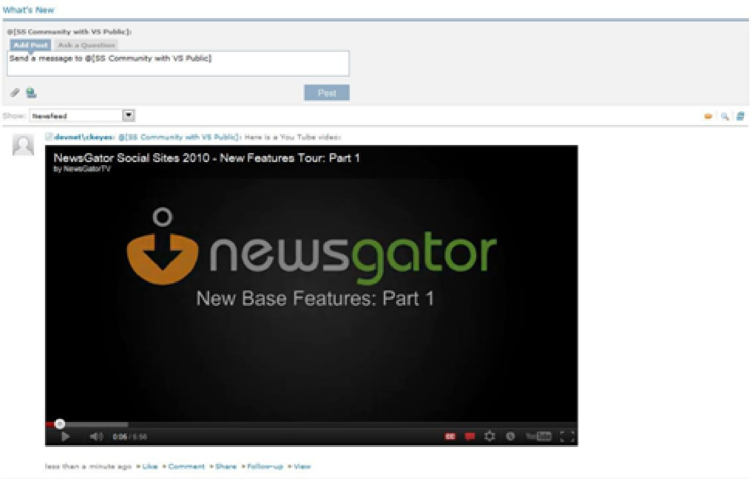



Notice that the thumbnail appears in the stream with the title and a description of the video.




Click on the thumbnail to view the video. All of the standard micro-blog functions are supported (e.g. commenting and liking.)

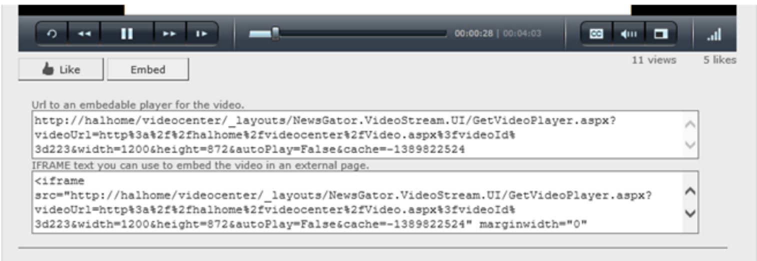
> **Note:**
> We don't provide any special authentication support for Qumu or Kaltura.




#### Embed code support

The video player has two kinds of embed code available. Clicking on the Embed button below the player displays both a URL to an embeddable player and a player wrapped in an iFrame.

Here is an example:




The latter works well with the Content Editor web part when pasted into the HTML source.

See here for details: Add video or audio to a page.

### Approving video content

Since videos are stored in a list, SharePoint can be configured to require approval of video content before it is encoded and posted to the site.

For details on how to configure a library (in this case, the NewsGator Video Library) to support content approval, see Require approval of items in a list or library.

Once content approval has been enabled, only those with appropriate permissions are allowed to approve content. If a user submits a video and this feature has been enabled, they are notified in their activity feed that the video is pending approval.

For details on how to approve or reject content in SharePoint, see Approve or reject items or files in a site list or library.

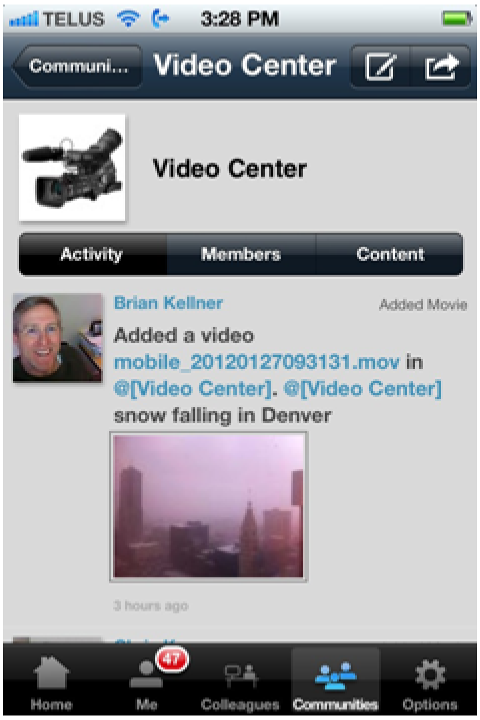
## 1.57.3 Using Video Stream from the mobile client

Video Stream supports uploading and viewing videos from the iPhone with the Aurea Social Mobile Client for iPhone.

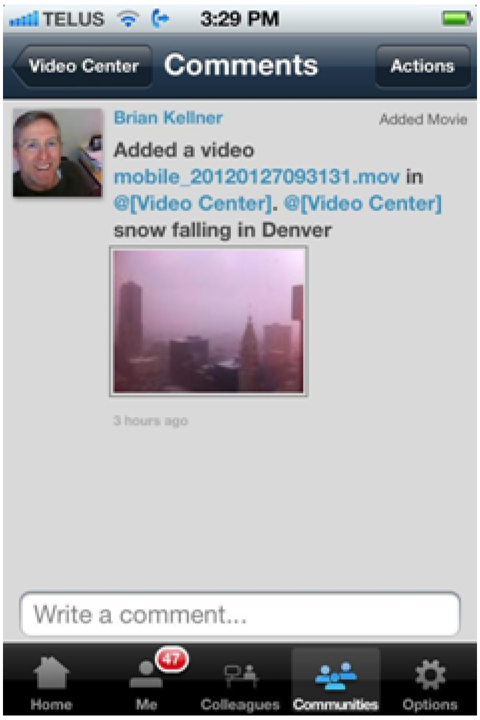
#### Browsing videos from the iPhone

Once you have installed the Aurea Social iPhone client on your iPhone and have it configured to access your Aurea Social implementation (see Aurea Social for iPhone section in this guide for details), you're are ready to browse videos. You can browse videos from your Newsfeed or from the communities that you are following.

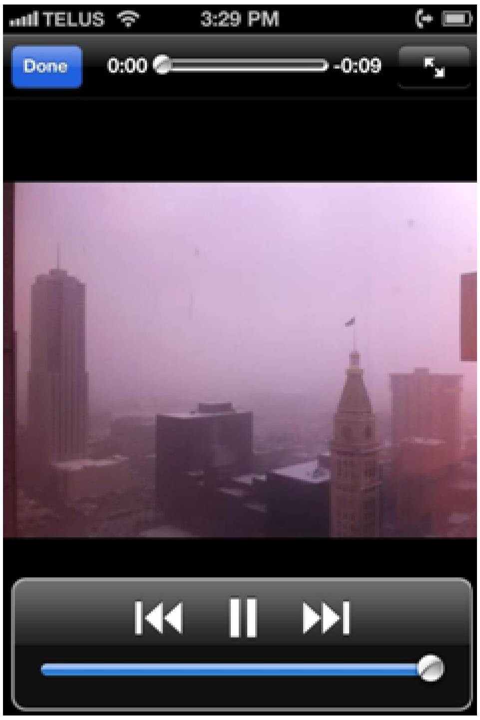
The example below shows a video from the Video Center community. Touching the thumbnail brings you to the next screen (where you can comment) and touching on the thumbnail again invokes the player.




*Screenshot 940: Touch thumbnail to open the comments page*




*Screenshot 941: You can comment on the video here*



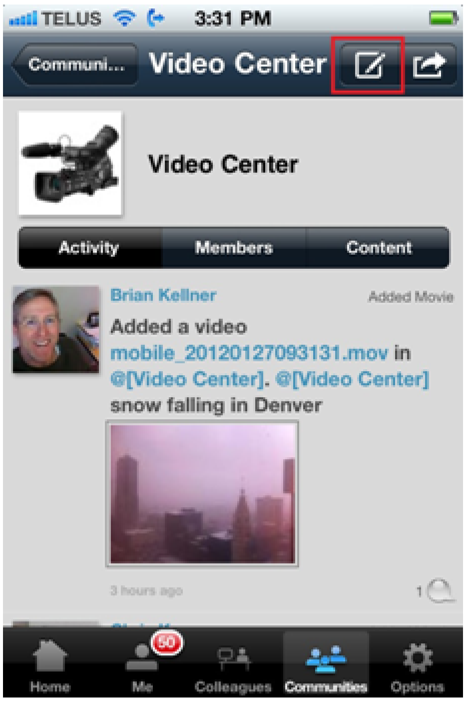

*Screenshot 942: Video being played*

**Uploading videos to the iPhone**

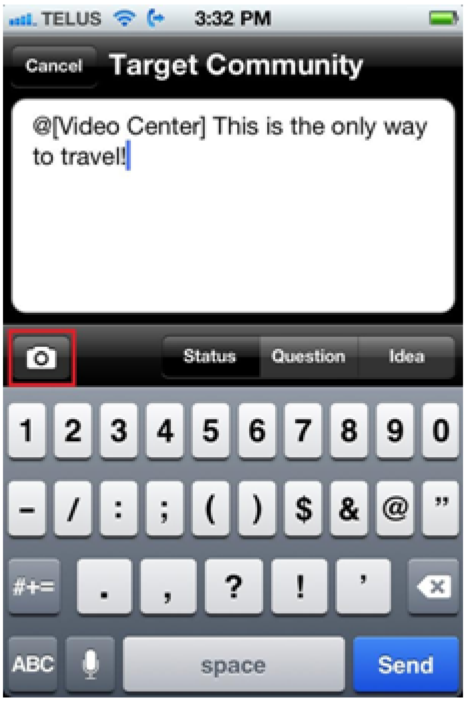
Uploading a video is straightforward.

Go to the main community screen and then touch the icon.

After that, enter the text for your micro-blog entry. To upload a picture, touch the camera icon and take a video or select an existing one.



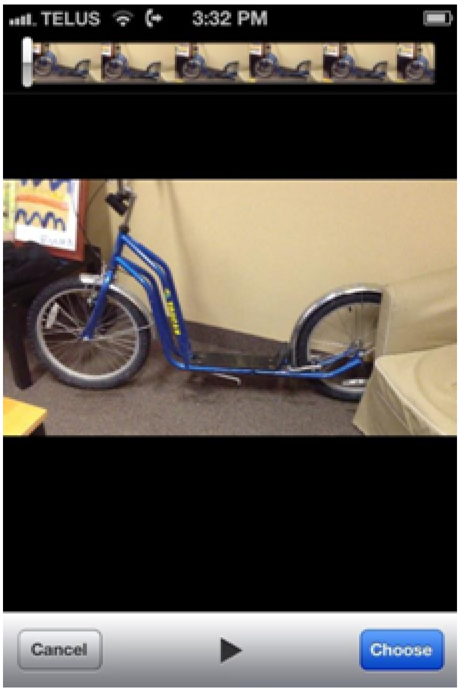

*Screenshot 943: Click edit icon*



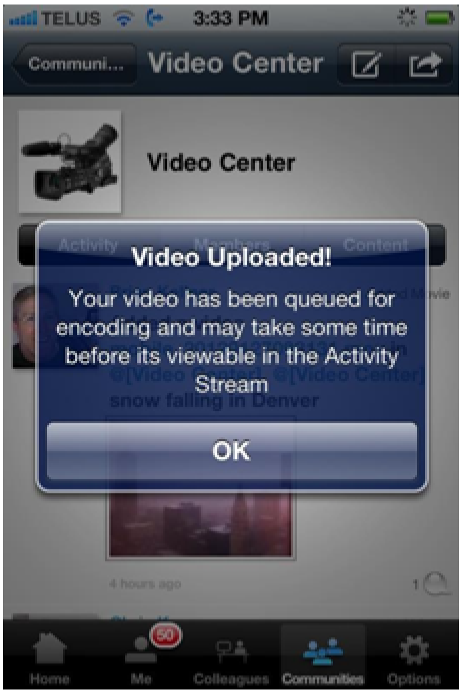

*Screenshot 944: Enter details*


*Screenshot 945: Upload/Take picture*

Choose the video and then touch **Upload**. Once uploading is done it will give you a message telling you that the uploading is done and that the video has been queued for encoding.




Touch **OK** and you will be brought back to the main community screen.




After the video has been encoded it will appear in the stream.

# 1.58 Aurea Social Enrich module

## Overview

The Enrich module for Aurea 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 converted into knowledge base articles for easier discoverability and searching.

Finally, knowledge base articles can be created for documents so that additional data about the document itself, it's 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. While organizations may follow a structured authoring and production process for the deployment of this feature initially, it is intended to support anyone who has a case study, the discussion of which, would facilitate learning.

## Prerequisites and compatibility

The Enrich 5.0 module requires Aurea Social 5.0. Optionally Spotlight 5.0 can be used to create badges to recognize users who create a high number of knowledge base articles and video scenarios.

## 1.58.1 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

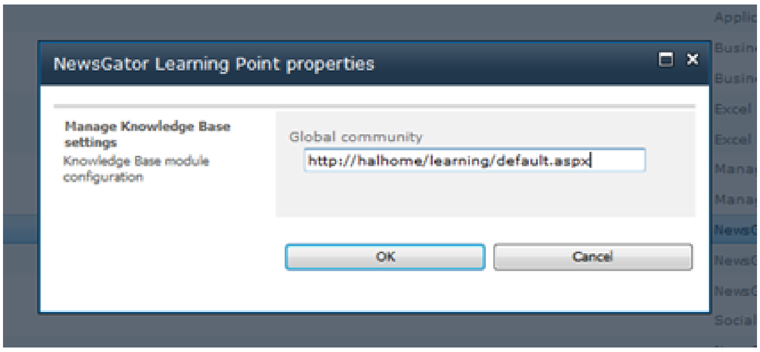
To turn on the Knowledge Base feature for a given community or site (including My Content), do the following:

1. Go into **Site Settings** > **Manage Site Features**.
2. Activate the **Newsgator Knowledge Base** (Web) feature.

To specify which community or site contains the global knowledge base, do the following:

1. Go to **Central Administration** > **Application Management** > **Manage Service Applications**.
2. Select the **Newsgator Learning Point Service** and fill in the URL as seen in below screenshot.

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.



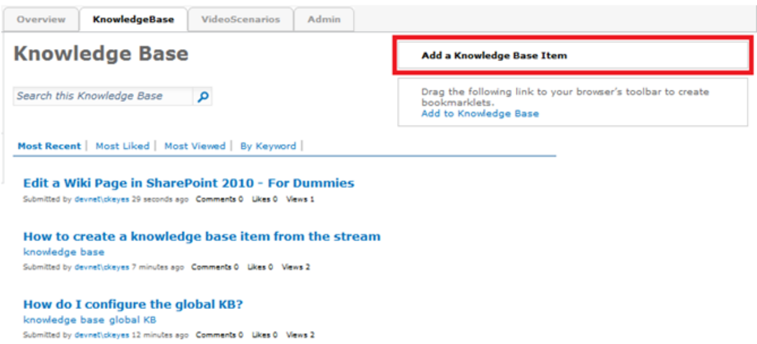

#### Creating Knowledge Base items

There are a number of ways of creating knowledge base items:

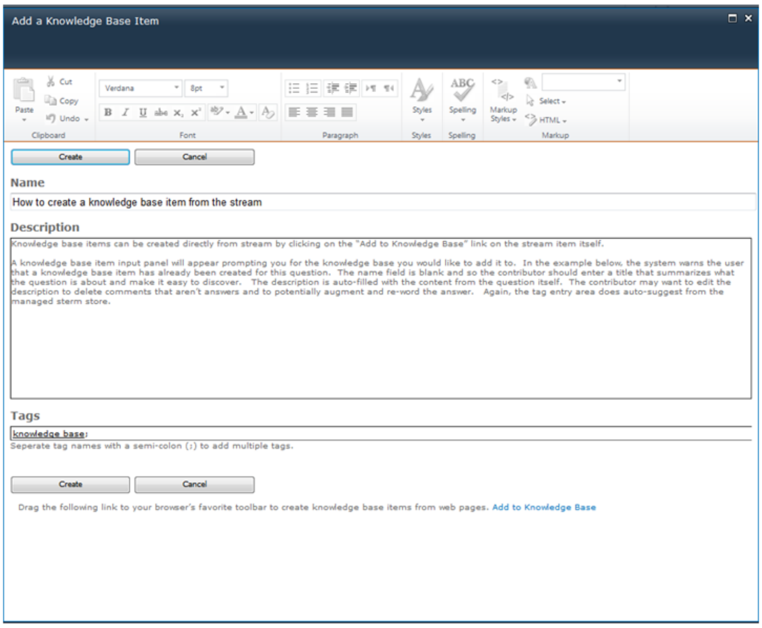
### Creating Knowledge Base Items from the Knowledge Base tab

You can create a knowledge base item by following the below steps:

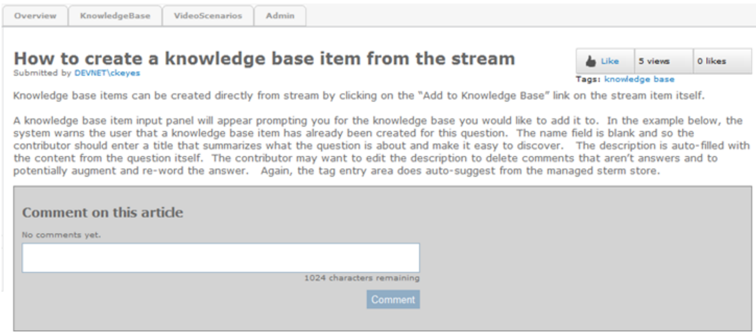
1. Click on **Add a Knowledge base Item** from the **Knowledge Base** tab. This pop up the **Add a Knowledge Base Item** panel.



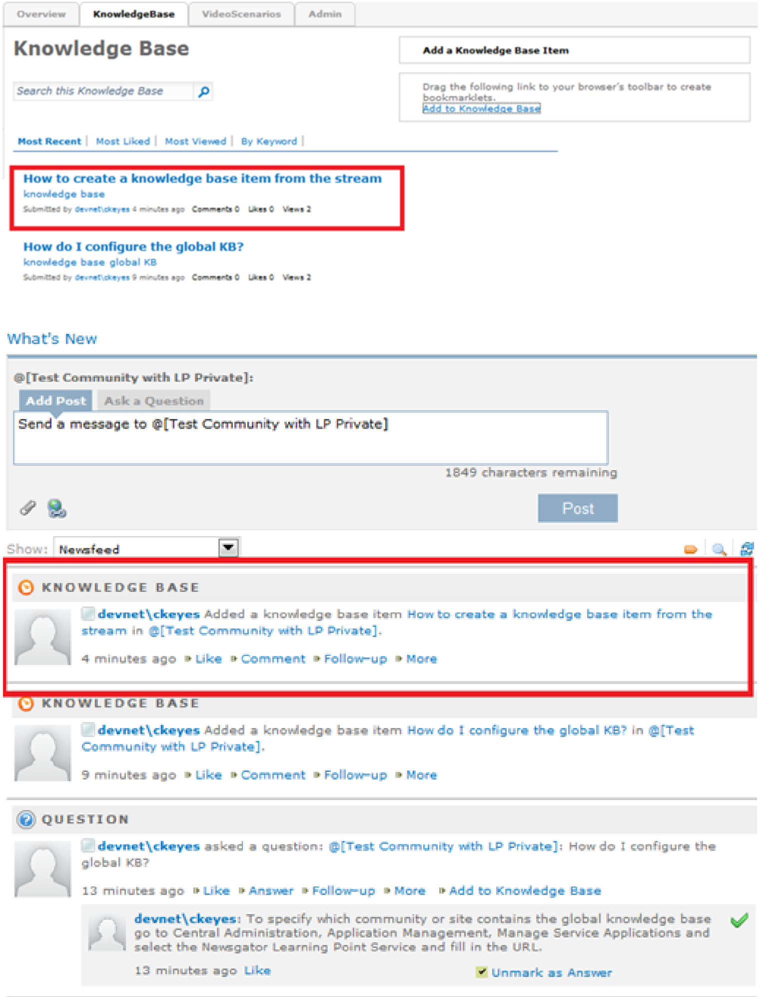
2. Fill in the fields accordingly and click on **Create** to create the knowledge base article.




The article is created in the current community. The article can be further edited, liked and commented on.




The article shows up in the Knowledge Base tab accordingly as well as in the stream as seen below in the two images below.

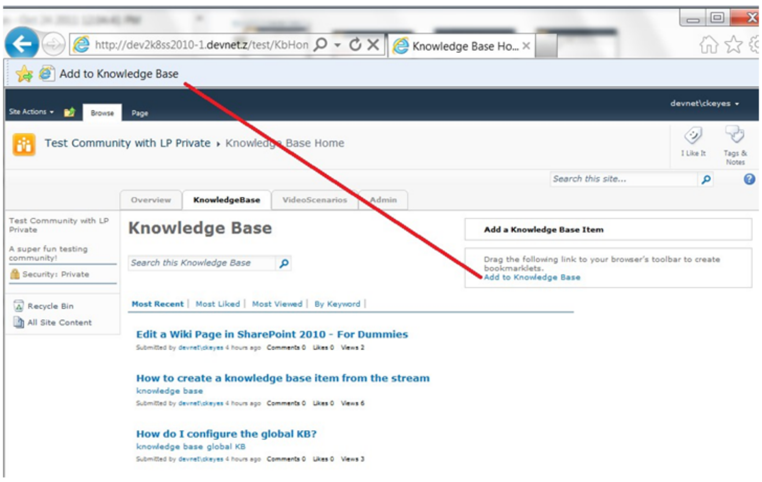



## Creating Knowledge Base Items using the Bookmarklet

Knowledge base items can be created from any web page by using the bookmarklet.

To install the bookmarklet, do the following:

1. Drag onto your browser toolbar the **Add a Knowledge Base Item** link that is below the **Add to Knowledge Base** web part on the Knowledge Base tab.




2. Once the bookmarklet has been installed, go to the web page that you would like to create the knowledge base article from and click on the **Add to Knowledge Base** bookmarklet.

3. A knowledge base item input panel appears prompting you for the same information as creating it from with the Knowledge Base tab with a few exceptions.

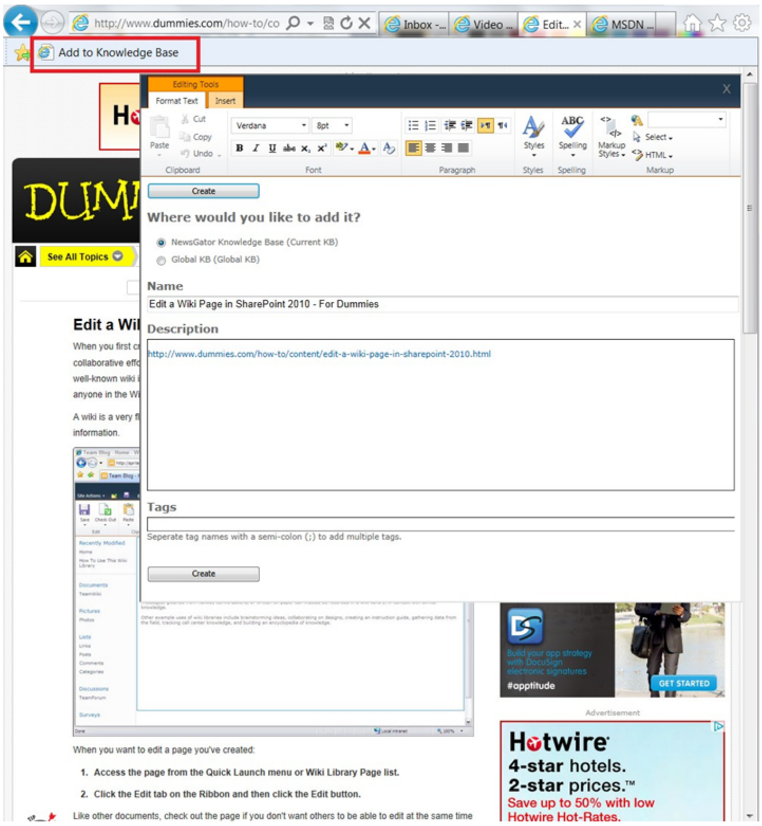
You are prompted for the knowledge base you would like to add it to. This could include:

- a global knowledge base, if enabled
- all communities that you belong to that have a knowledge base
- a personal knowledge base, if created

The title is auto-filled with the title from the web page. The description is auto-filled with the URL of the web page.

The system also tracks the URL internally so it can potentially warn (but not prevent) future users from creating a knowledge base item for this URL for a given knowledge base.

4. Click on **Create** to create the knowledge base article.

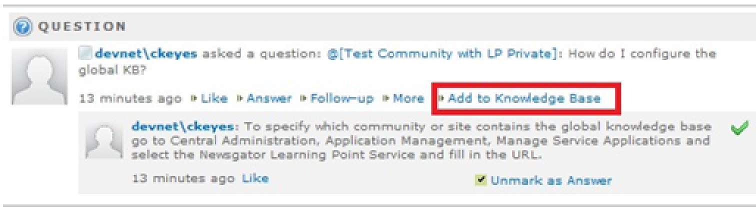



## Creating Knowledge Base Items from the stream

Knowledge base items can be created directly from the stream by clicking on the **Add to Knowledge Base** link on the stream item itself as seen below.

This applies to the stream within a community or **My Newsfeed**.

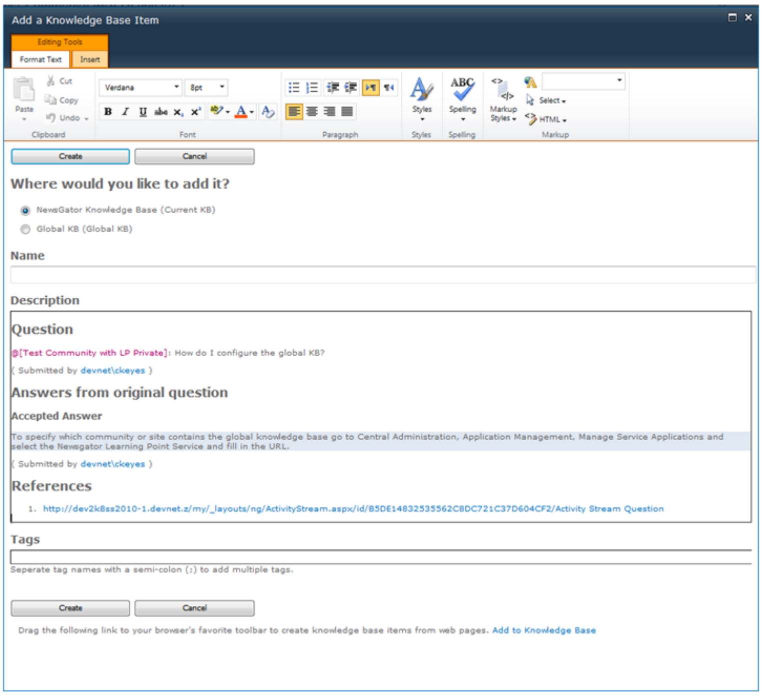
> **Note:**
> A global knowledge base or personal knowledge base needs to be enabled to create knowledge base items from posts in the My Newsfeed.




A knowledge base item input panel appears prompting you for the knowledge base you would like to add it to. The name field is blank when the form first opens.

The description contains content from the post itself including the original post and all of the comments and who made the comment.

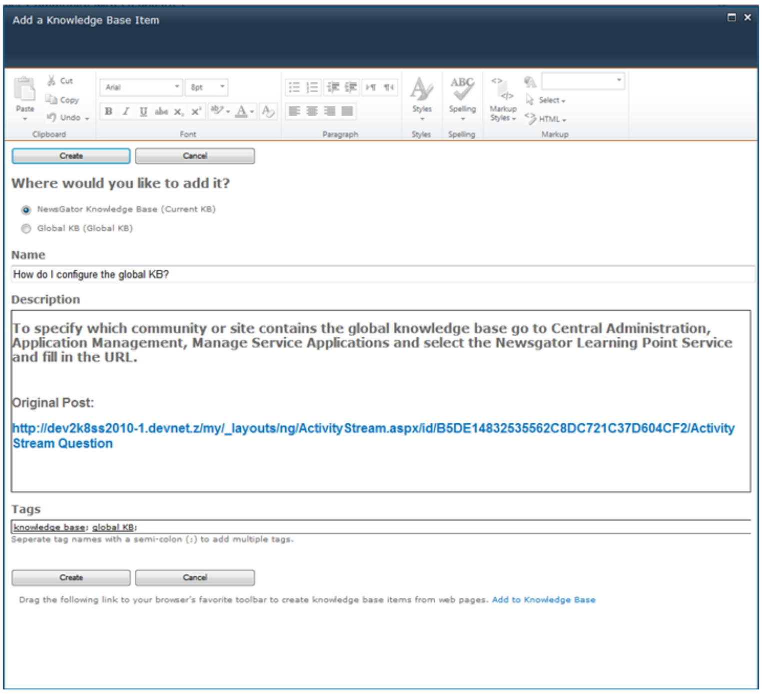
The **References** section contains the link to the original post. If it's a question, the responses also indicate which responses were marked as an answer.




The contributor should enter a title that summarizes what the knowledge base item is about and make it easy to discover.

If the knowledge base item is being created from a question, the contributor may also want to delete comments that are not answers and potentially augment and re-word the answer.

The tag entry area does auto- suggest from the managed sterm store.




## Creating Knowledge Base Items from a document

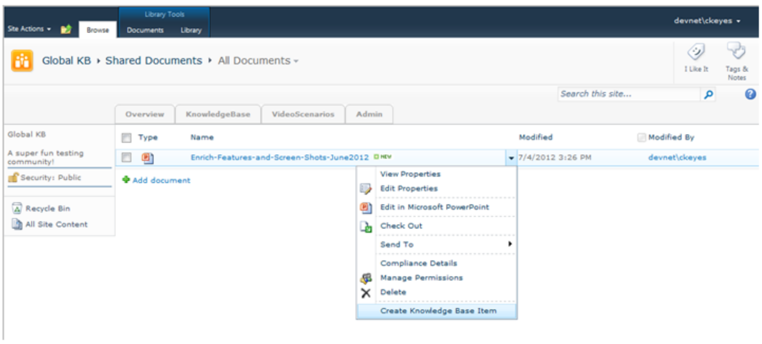
Sometimes its helpful to created a knowledge base item from a document to provide extra data about how the document might be used, to give extra visibility to it and to allow users to comment on it.

It's a nice way for authors to get feedback on a document outside of their immediate review circle.

To create a knowledge base article from a document, do the following:

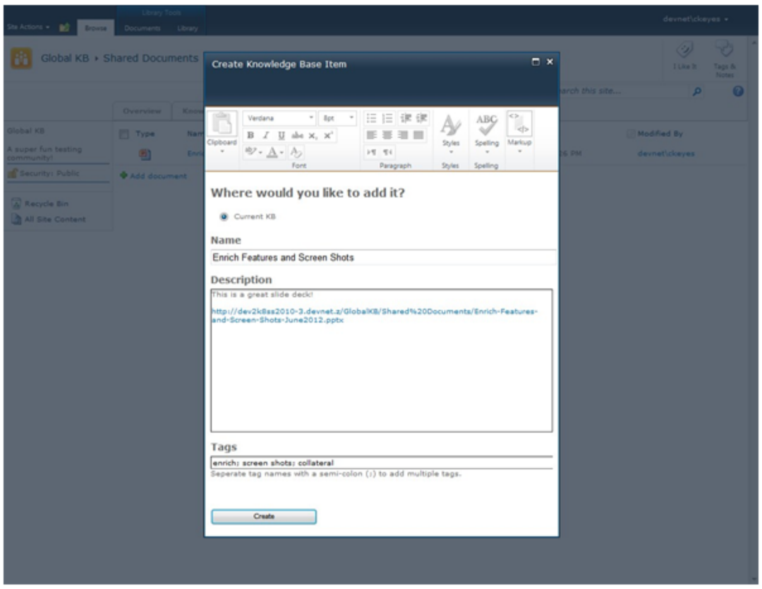
1. Go to the document list.

2. Click on the document in the list and select **Create a Knowledge Base Item** from the menu.

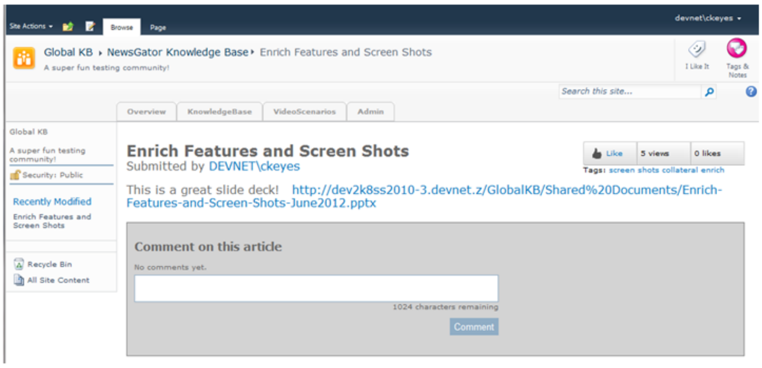



This pops up an input panel with the title auto-filled from the document name and the link to the document in the description.

3. Edit the title to make it discoverable, add extra comments in the description field as well as tags.

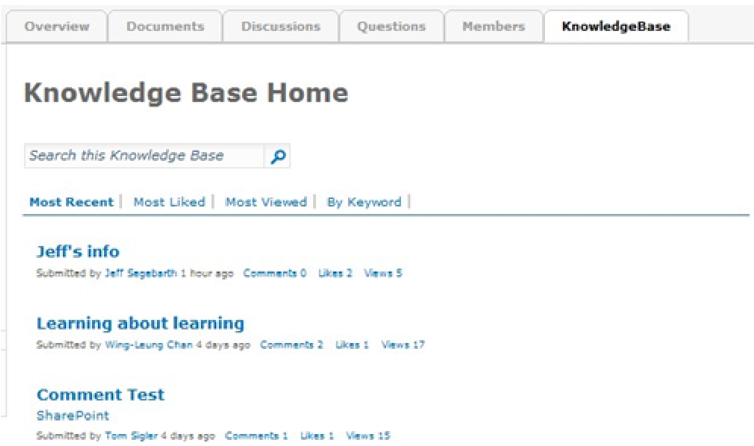



The created article is shown below.




**Browsing and searching**

After some knowledge base articles have been added, users can search for knowledge base items and filter by most recent, most like, most viewed and by keyword.




*Screenshot 946: Knowledge Base Home*

**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.

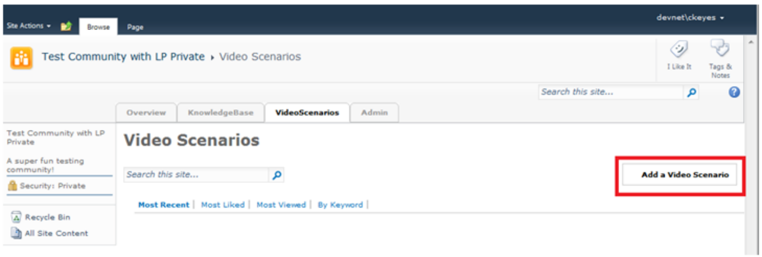
The bookmarklet only lets you add Knowledge Base articles to the same farm from which you originally added the bookmarlet to your browser.

## 1.58.2 Video Scenarios

**Creating video scenarios**

You can create a video scenario by following the below steps:

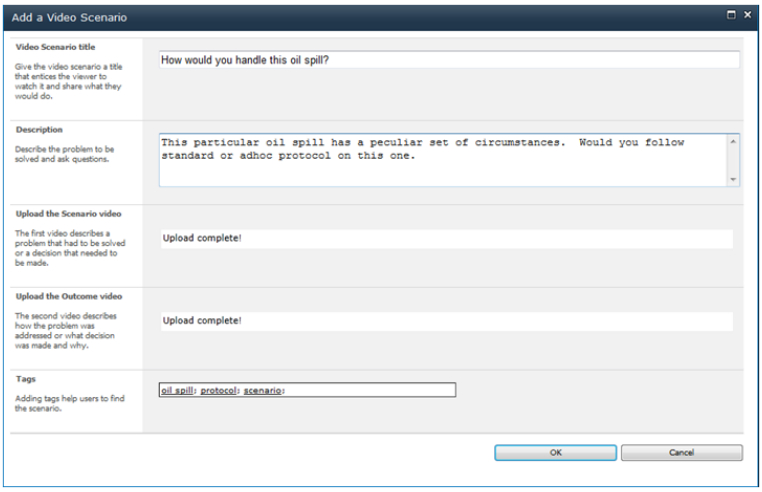
1. Click on the **Add a Video Scenario** link in the **Video Scenarios** tab. This pops up the **Add a Video Scenario** panel.




*Screenshot 947: Click **Add a Video Scenario***

2. Make the following entries on the **Add a Video Scenario** page:

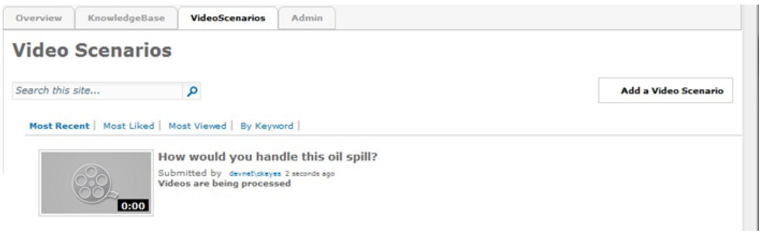
- Enter a title that helps users discover the scenario and entices them to participate.
- Enter a description and set of tags that will help the scenario be discovered via search.
- Specify the scenario and outcome files.




*Screenshot 948: Fill in the fields and click OK*

3. Click Ok.

4. The video scenario appears in the **Video Scenarios** tab and indicate that it's pending encoding.




*Screenshot 949: Videos are being processed*

5. The contributor receives notices in their newsfeed that videos are pending encoding as well as similar notices once they are encoded in the example below.


*Screenshot 950: Newsfeed notice*

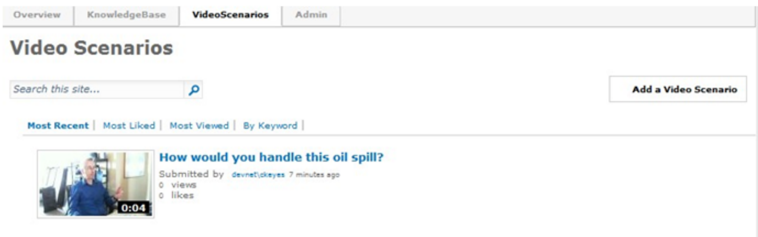
**Browsing and searching**

Go to the Video Scenarios tab to search and browse video senarios. Users can search for video scenarios and filter by most recent, most liked most viewed and by keyword.

**Participating in a video scenario**

To participate in a Video Scenario, simply click on the title or the thumbnail on the scenario in the Video Scenario tab or from the video scenario entry in the stream.

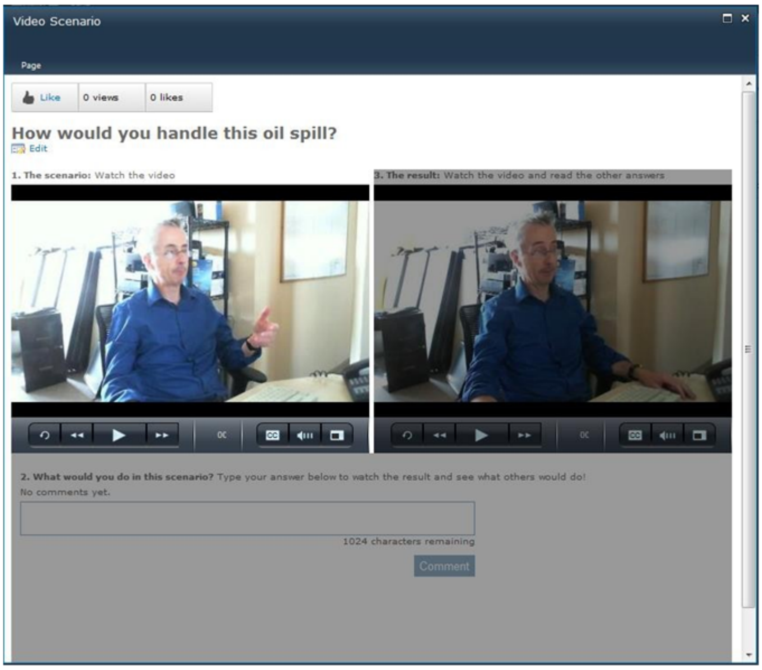
See examples of both below.





Clicking on the title or thumbnail will cause an overlay to pop-up like the one below.

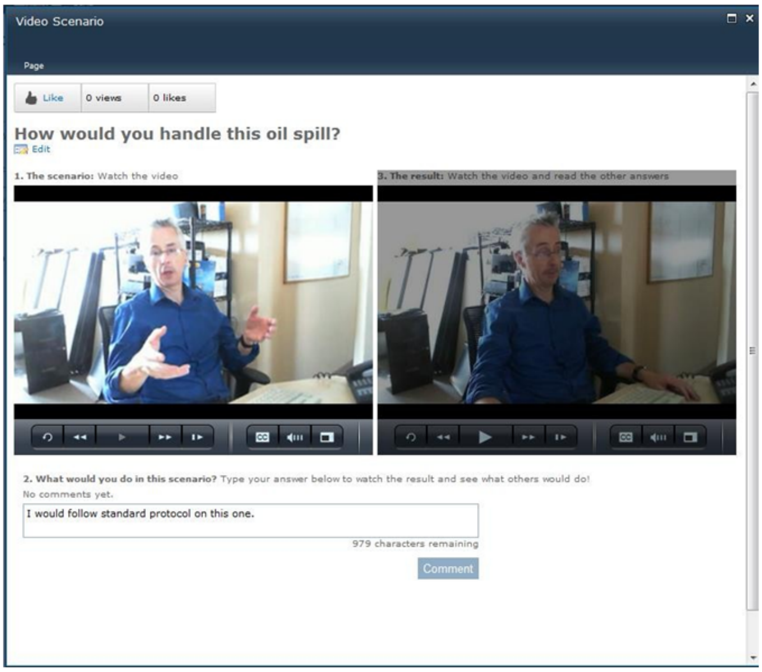
If this is the first time you have viewed this scenario (or first time without watching the video in its entirety), you will see a video that is viewable with the second video and comment area greyed-out.




*Screenshot 951: Comment area greyed*

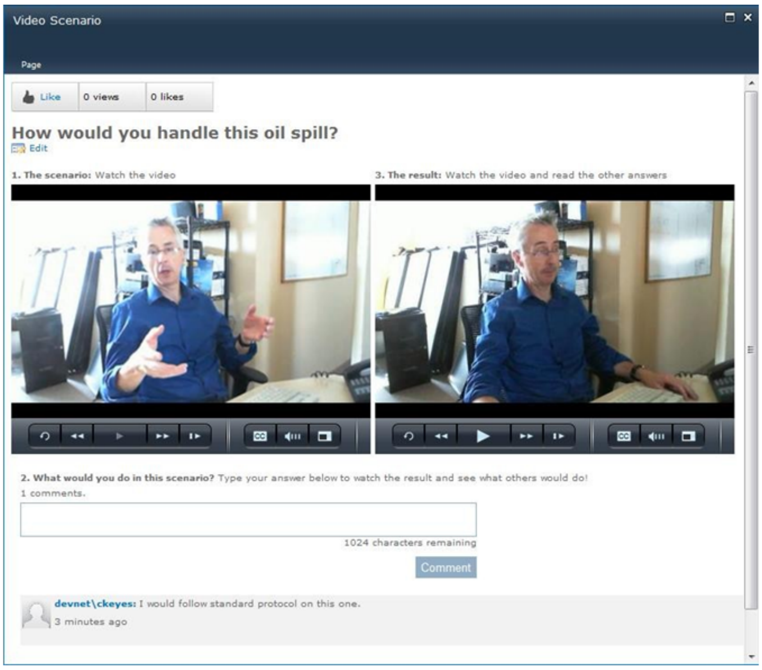
Watch the scenario video by clicking on the play button of the first video.

Once the entire video has been played, the comment area is ungreyed-out and is available for commenting as seen below but the second video can't be watched until the comment has been posted as seen below.



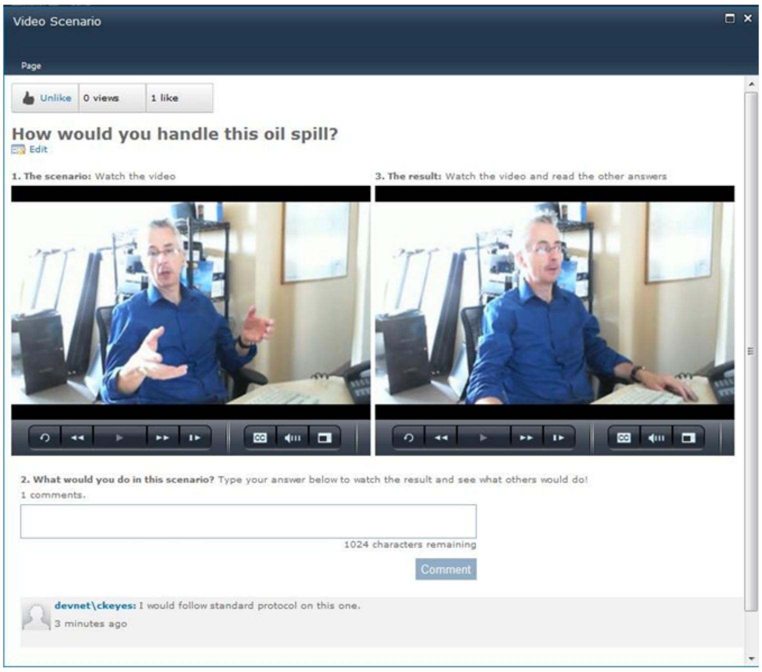

*Screenshot 952: Comment area is ungreyed*

Once the comment has been posted, the user can watch the scenario result video and see their own comment posted. If others had taken the video scenario already, those comments would also be displayed.




*Screenshot 953: Comments displayed*

The user may also like the video in the top left hand-corner of the video scenario panel.




## 1.59 Overview of the mobile modules

> **Note:**
> This section serves primarily as reference for older versions of mobile access. Please see specific release notes for native mobile clients and capabilities of Skyvera ONE as a mobile access solution for Aurea Social.

In addition to the native apps, there is also Lookout Mobile Web, an HTML 5-based option that can be accessed via a smartphone browser without having to install additional software.

### Startup

After installation, click the Social Sites 2010 icon, pictured below, to open the application. This may be located in your Downloads folder.


## 1.59.1 Lookout Mobile Web

This section has information about the Lookout Mobile Web. It is a browser based application. Below are the details about this application:

### Accessing Lookout Mobile web

The Lookout Mobile Web interface can be accessed at the URL below in the browser on your smartphone.

> **Note:**
> If you're testing on a server on your internal network, it's still always best to use the fully-qualified domain name of your server as some mobile phones don't resolve short names well.

```
http://[SERVER]/_layouts/mobile/ng/default.aspx
```

You can leave off the `default.aspx` if you want to shorten the overall UR `http://[SERVER]/_layouts/mobile/ng/`.

### Features of Lookout Mobile web

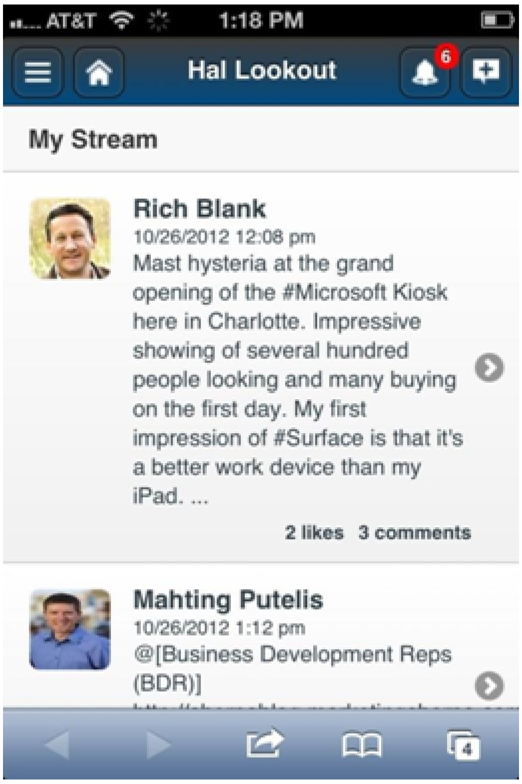
Lookout Mobile Web provides many of the same features as the main Lookout page in Aurea Social.

The main goals are to let users view and respond to stream items as well as posting microblogs, questions and private messages.

### View

### Main stream view

The browser opens to the **My Stream** view.

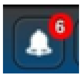


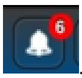

*Screenshot 954: My Stream view*

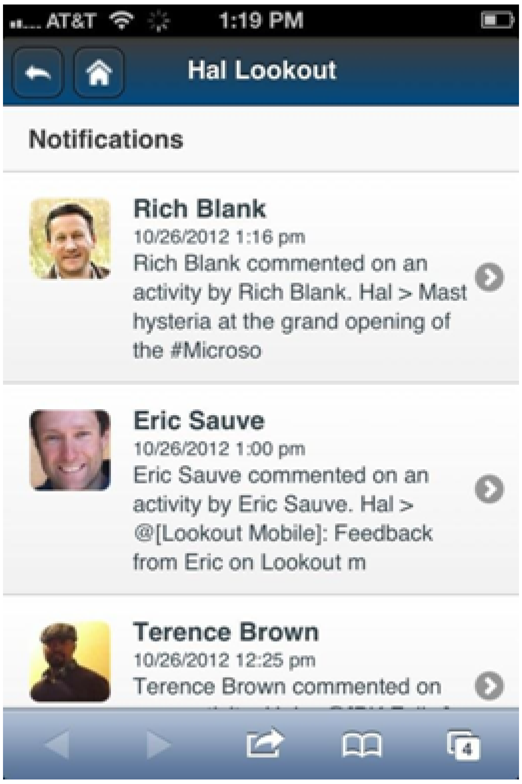
Click  in the upper left to go to the Lookout Menu view.

Click  to the My Stream view and refreshes the stream.

On the top right, click  to post to the stream.

The  tells the user how many notifications they have and gives access to them.

The screenshot below shows a view of the notifications page if you click .




Clicking to view notifications resets the notification count to zero.

The stream shows items sorted by the date of last activity (just like the default view in the activity stream in the full web interface). The stream can be scrolled through vertically.

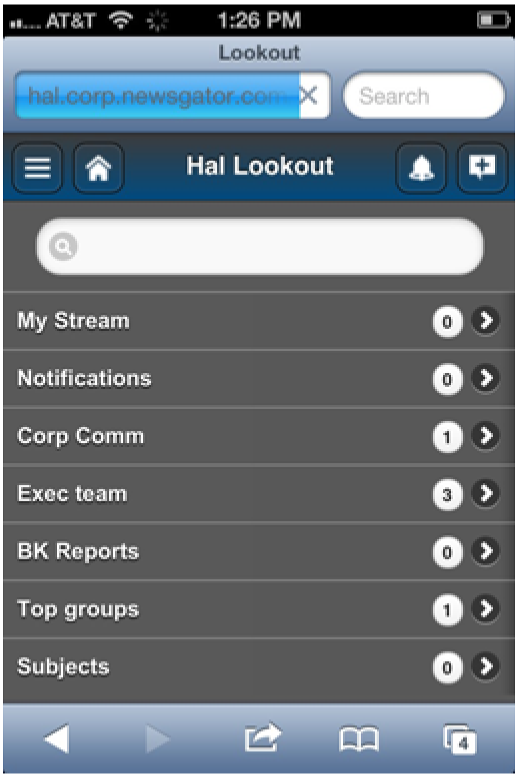
When the user reaches the last item, a 

link is presented. Clicking this retrieves an additional 25 items from the server.

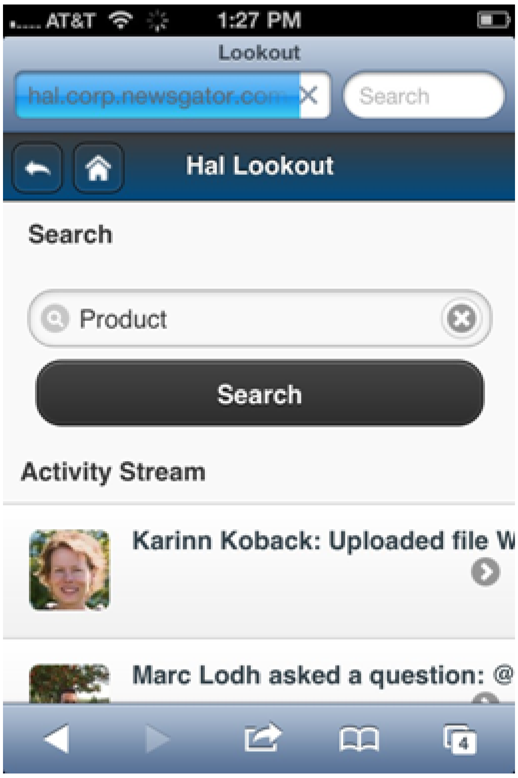

*Screenshot 955: Click See more to retrieve additional items*

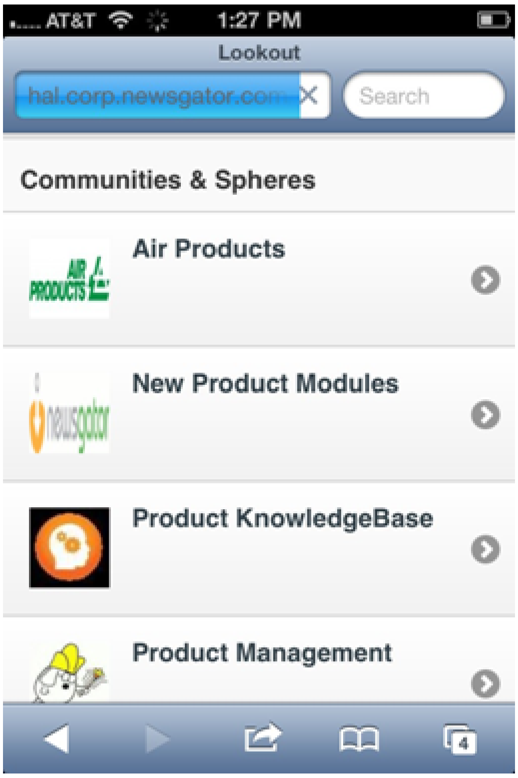
## Lookout menu view

The **Lookout** menu view provides several ways to get filtered views of your activity stream. The screenshot below shows the top portion of this view.

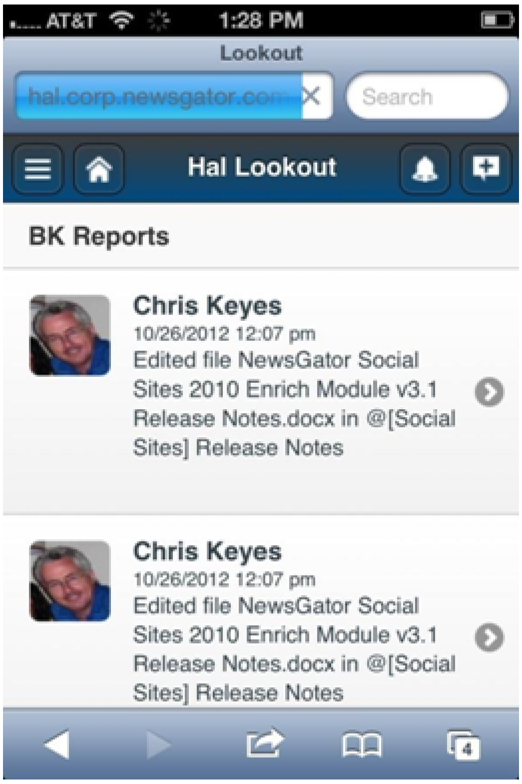



The search box at the top of the screen allows for searching the activity stream for items that match the search string. If there are communities or spheres that match the search string, they are shown at the bottom of the search results (see two screenshots below).



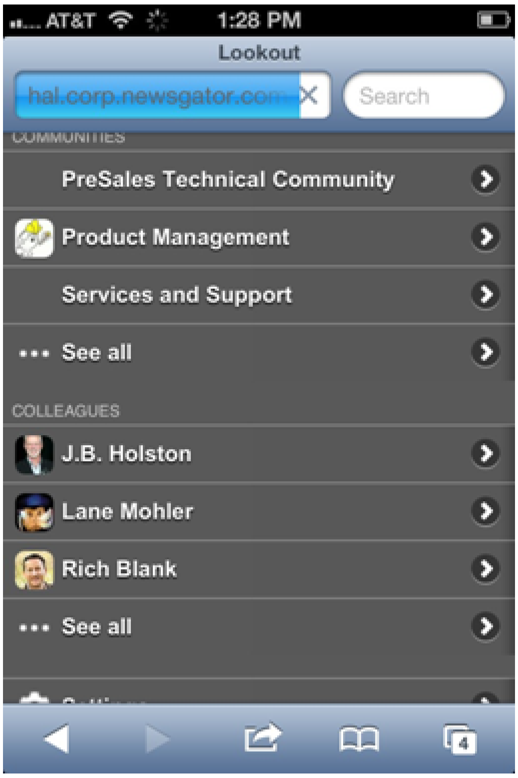




Tapping on one of your tiles on the Lookout Menu view displays the list of stream items that match that tile.

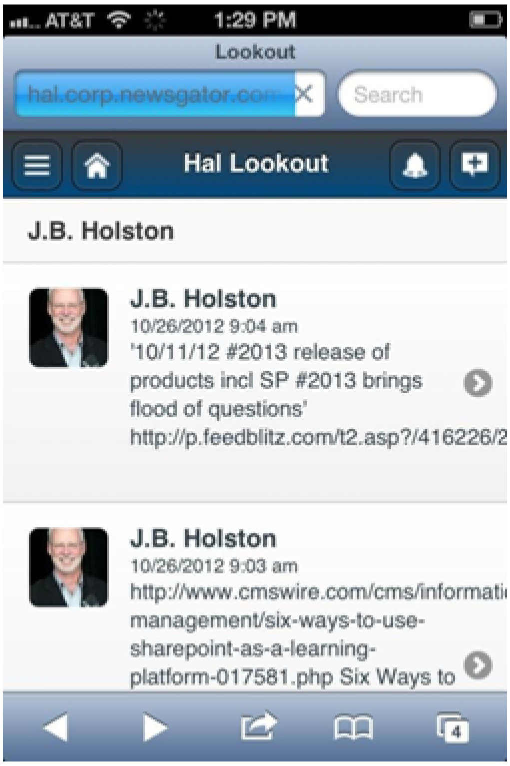



The title of the tile is displayed at the top of the stream.

The lower portion of the Lookout Menu view shows the three top scoring communities and colleagues based on your interactions in Aurea Social along with the ability to search either of these.

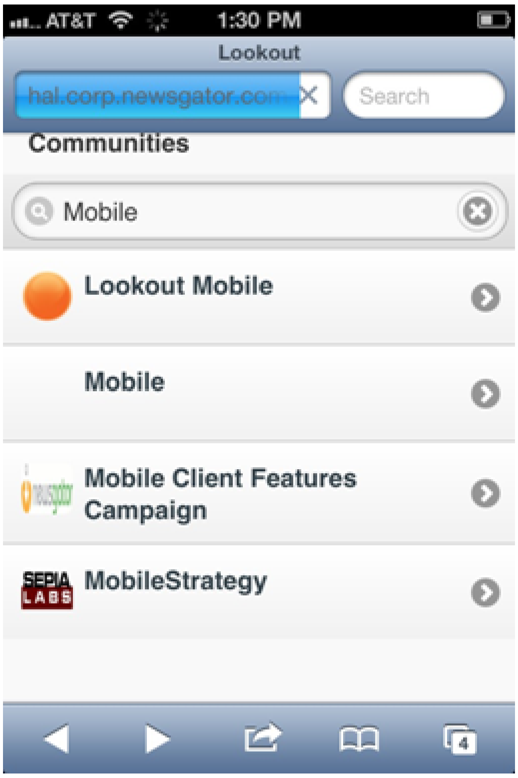


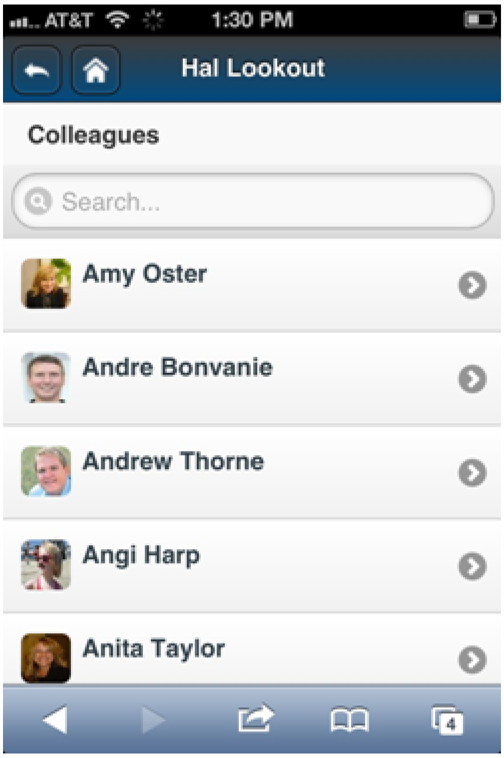

Tapping on a community or a colleague displays a view of the events from the respective community or colleague (or items where that colleague is @ targeted).




Tapping on the **Community (see all)** or **Colleagues (see all)** bar displays the search dialogs shown below.

Typing in the search box will filter down to specific communities or colleagues that match the search string.

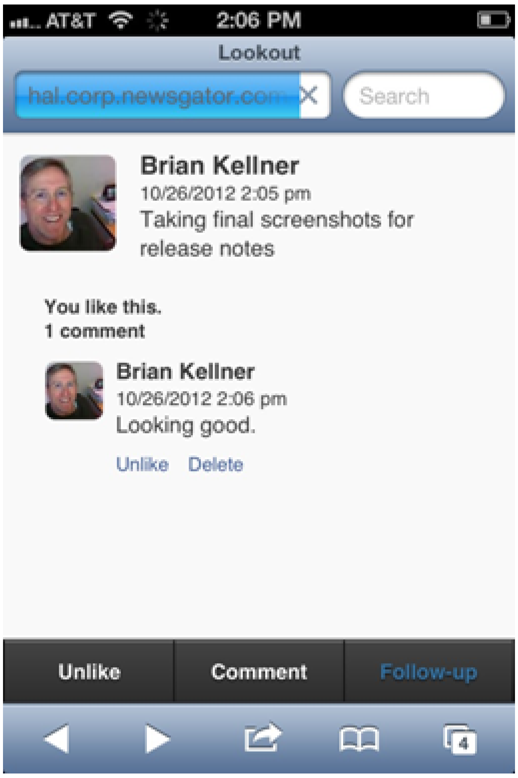



## Respond

### Standard responses

Tapping an item in the stream view displays the single page view of that item. This view lets the user respond to that item.



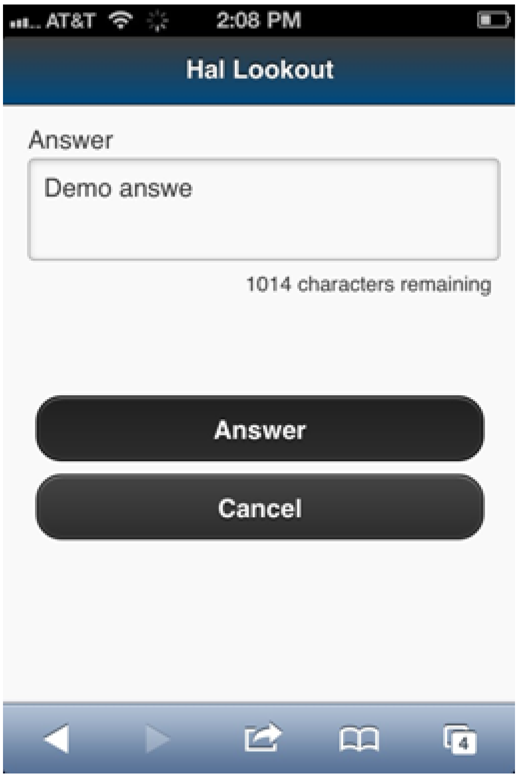

In the screenshot above, the **like** button at the bottom left has been tapped (and then changes to **unlike** after you tap the "like" button).

The **follow-up** button at the bottom right has also been tapped, and the text color has changed.

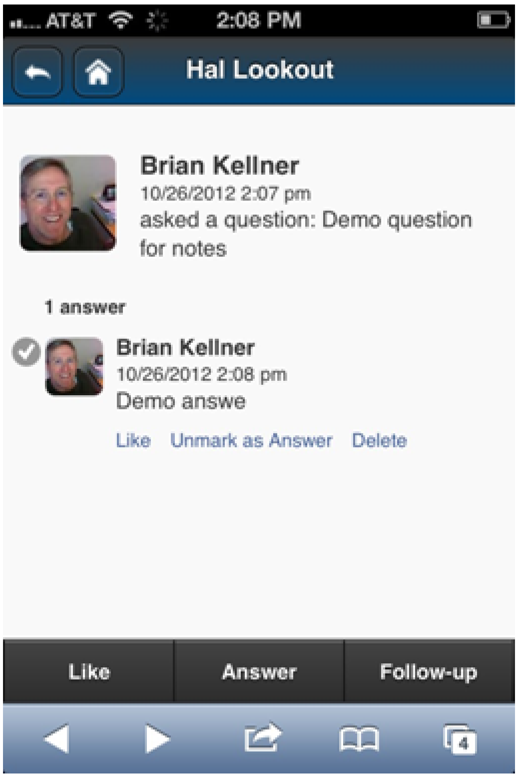
Tapping the comment button allows adding a comment. If there are comments already on items, users can click **like** on comments (the link then toggles to **unlike**).

## Questions

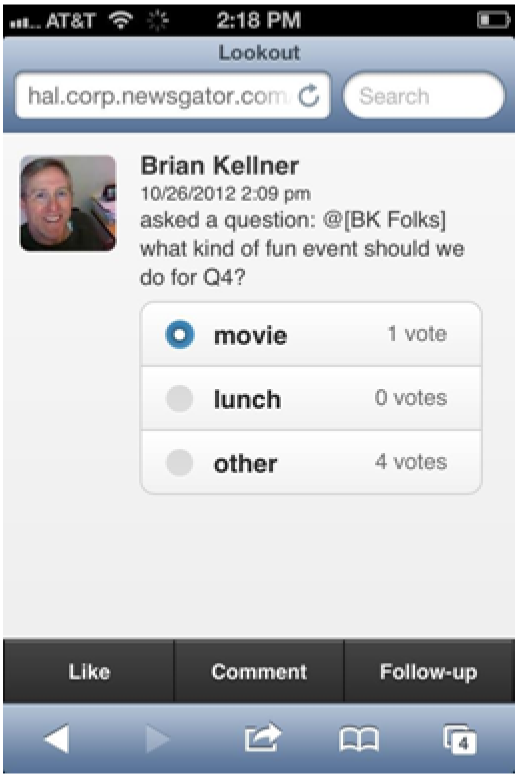
Questions have slightly different responses than other stream items. Adding an answer is exactly like adding a comment.




The user who asks a question has the opportunity to mark answers on their question as good answers.




If the question was a poll, users can choose an answer by tapping on the radio button.




## Post

### Microblog

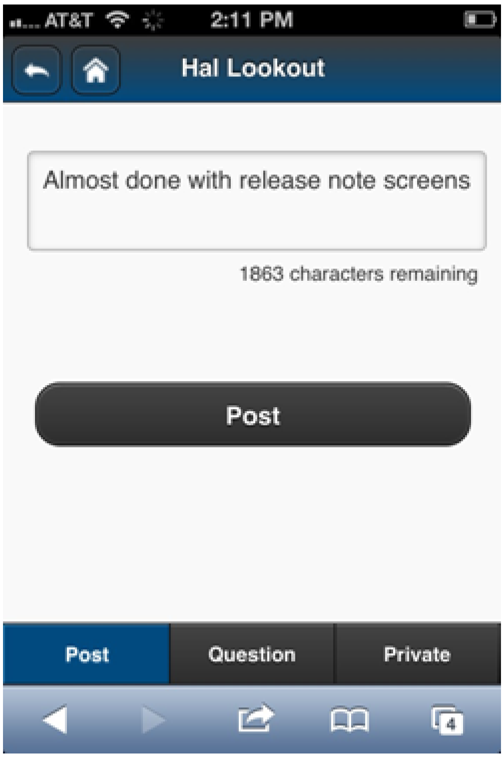
Posting a microblog lets others know what you're doing. Clicking the post control in the upper right automatically defaults to adding a new microblog.

Click in the entry box to type in a message.

Adding hashtags (typing the # symbol followed by text) will make your message more discoverable.

You can create multiple-word hashtags by surrounding the words with [ ] like this #[mobile development].

You can use the @ symbol to target the message to specific colleagues or communities/spheres.

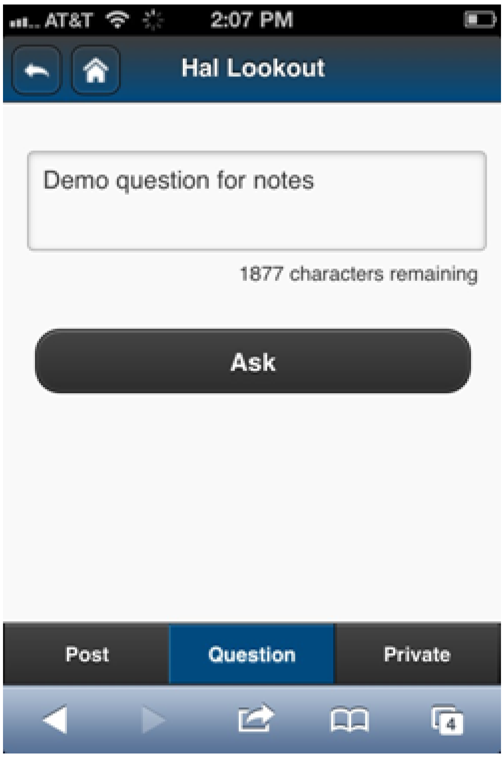



## Question

To post a question, select the question button at the bottom of the screen after tapping the post control.

Adding hashtags (typing the # symbol followed by text) makes your message more discoverable (the question will automatically route to users who have matching tags in their **Ask Me About** field in their profile.

You can use the @ symbol to target the message to specific colleagues or communities/spheres.

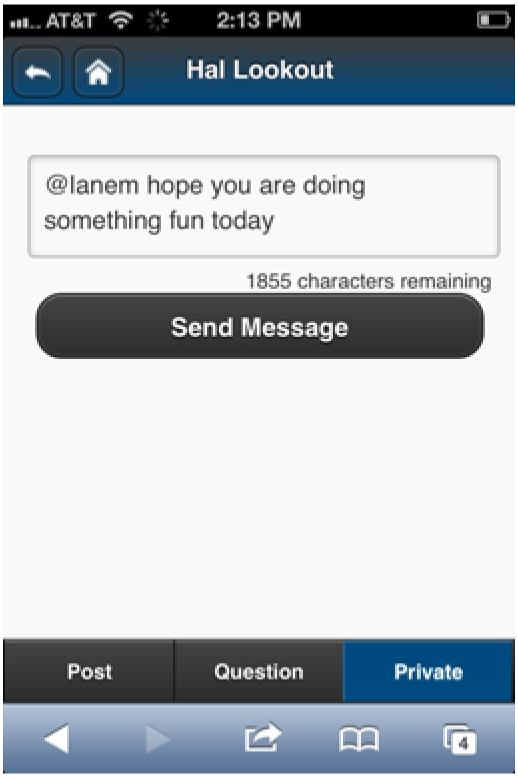



## Private message

Private messages are like microblogs, but they are only visible to specific colleagues.

To say who should receive the private message, type in the '@' symbol and start typing characters.


Tap the “return” or “enter” key to select the current highlighted option. Then finish typing your text before sending your message.

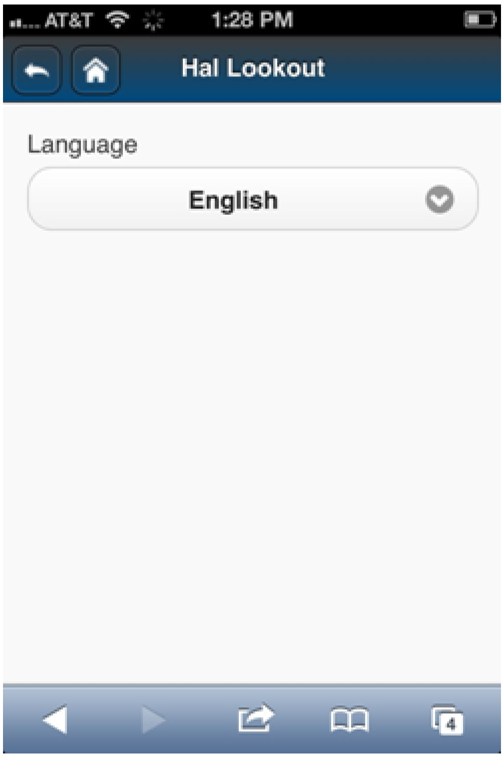



*Screenshot 956: To send your message click on* ***Send Message*** *button*

## Settings

### Language

Language is currently the only user-adjustable setting.




Click the language drop-down to show the possible language choices.


*Screenshot 957: Language choice*

Once a language is selected the UI text is shown in that language. Stream items are in the language they were created in.


*Screenshot 958: UI text shows in the selected language*

# 1.60 iOS 4.5 User guide

## Note on versions

The iOS user guide for iOS 4.5 is included here for convenience. Please see specific release notes for current versions.

> **Note:**
> As of March 2017, support for MDM-integrated versions of the Aurea Social native clients has ended.

Features – iPhone

The Aurea Social iOS app accompanies Aurea Social on SharePoint, giving you access to your Aurea Social colleagues, communities and their associated activities on your iPhone, iPad, or iPod Touch.

## 1.60.1 Getting started

**Device requirements**

Aurea Social for iOS requires iOS 7 and above. The app is a universal app formatted for both iPhone and iPad.

The app works with Aurea Social server versions 3.1 and above. If you're not sure what server version you are using, contact your IT administrator.

**Download and install**

Aurea Social for iOS can be downloaded by following this link: Social Sites.

**Logging in**

When you first launch the app, you will see the log in screen.


*Screenshot 959: Login screen*

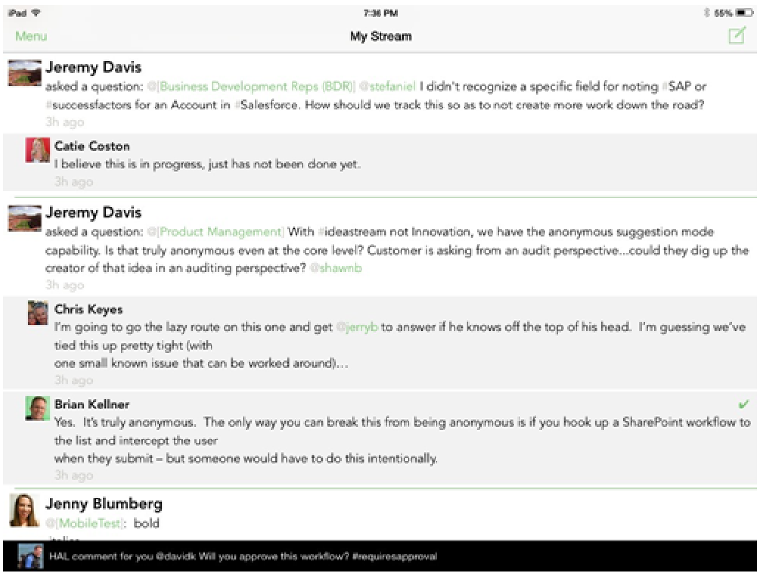
Provide your network credentials to access Aurea Social. If you aren't sure what your credentials are, or what the domain and server fields should be, contact your IT administrator.

### 1.60.2 My Stream

The first thing you see when you sign into the app is a view of your Stream. This is a collection of activity made up of all the people, activities, and communities that you follow.


*Screenshot 960: View of your Stream on iphone*

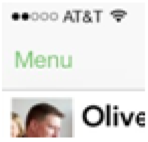
And here's on iPad:




*Screenshot 961: View of your Stream on iPad*

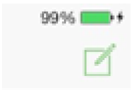
Let us have a look at some of the elements that make up this screen:

**Sidebar menu**



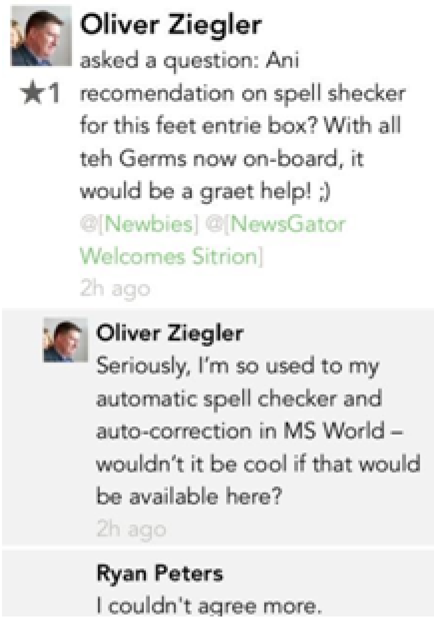

The sidebar menu button on the top left-hand corner of the screen is how you access all of the other screens in the app. You can either tap the button, or you can open the sidebar by swiping from left to right on the screen.

**Compose button**




The compose button in the top right-hand corner of the screen is how you compose messages and ask questions.

**Stream items**



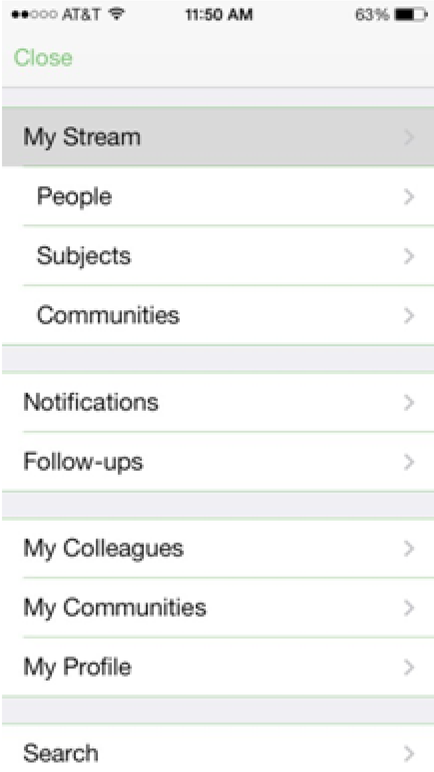

Individual posts in the stream can be viewed by tapping on them. From here you can comment, like, flag for follow-up, or if it's a question, answer it.

**Notification bar**


If you have any unread notifications they will appear in a black bar at the bottom of the screen. By tapping on this bar you can view all notifications for you.

## 1.60.3 Navigate

Navigating around the Aurea Social app is primarily done from the sidebar menu, accessed by either the menu button in the top left-hand corner of the screen, or from swiping from left to right.




*Screenshot 962: Sidebar menu*

You can access your Stream or the tiles within your stream that you've setup through Lookout.

Below your tiles are:

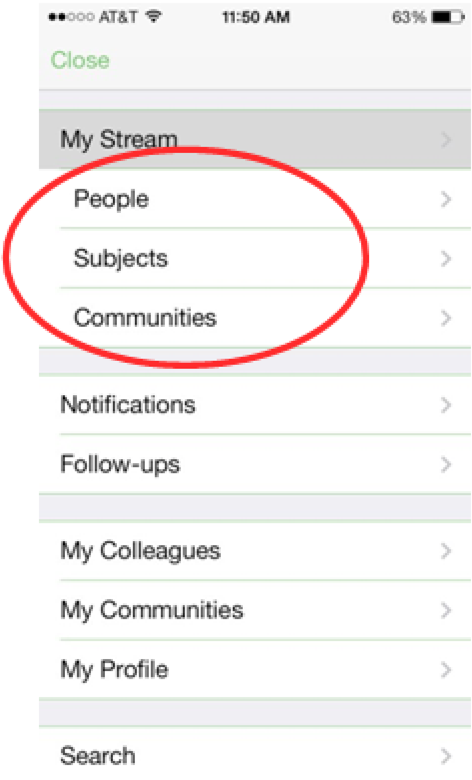
- Notifications
- Follow-ups
- your Colleagues
- Communities
- Profile
- an option to search Aurea Social
- the Aurea Social app About page
- option to Logout of the app

## 1.60.4 View

**My Tiles**

In Aurea Social Lookout on the web you have control over what tiles appear based on what content you would like to see.

The Aurea Social app reflects how you have curated your experience. See below screenshot depicting the sidebar navigation, the tiles are "People," "Subjects," and "Communities".

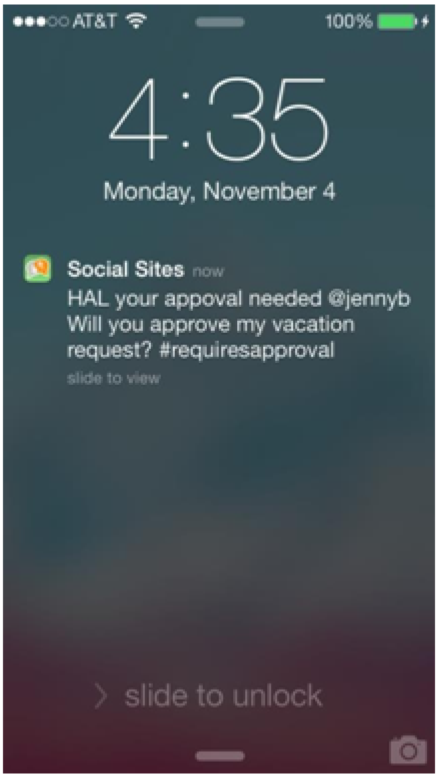



Notifications and follow-ups

## Push notifications

If you are using the Aurea Social iOS app against Aurea Social server version 4.5 or 5.0, you can elect to receive push notifications from the app.

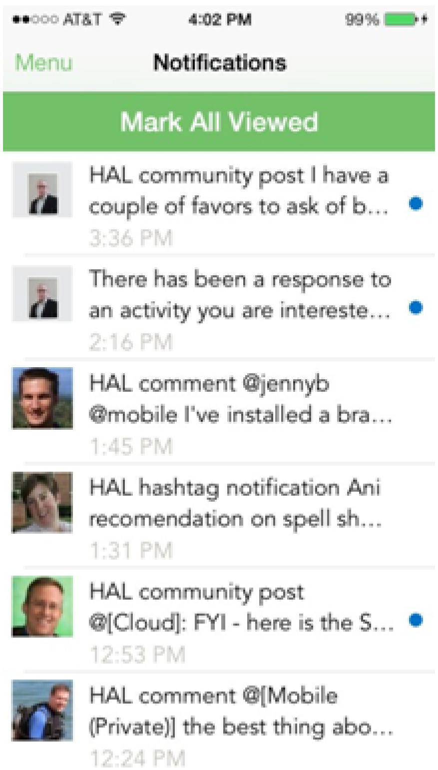
When you very first launch the Aurea Social app you are asked if you would like to receive notifications. You can later change this setting in your iOS device's Settings app.




By sliding from left-to-right on the notifications, you will be taken to that particular post in the app.

### In-app notifications

The notifications screen can be accessed either from the sidebar menu, or from the aforementioned black bar that will appear on the bottom of your stream.




*Screenshot 963: Blue dots appear for unread notification*

This screen shows all notifications. Unread notifications have a blue dot next to them. Marking as read removes the dot.

#### Follow-ups

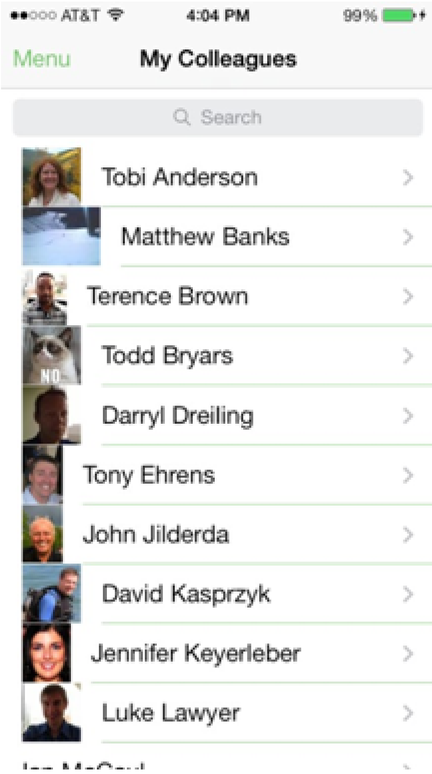
The follow-ups stream contains items that you've flagged for follow-up.


You can toggle any stream item for follow-up or not by tapping on the flag icon for a post.

#### Colleagues and communities

### Colleagues

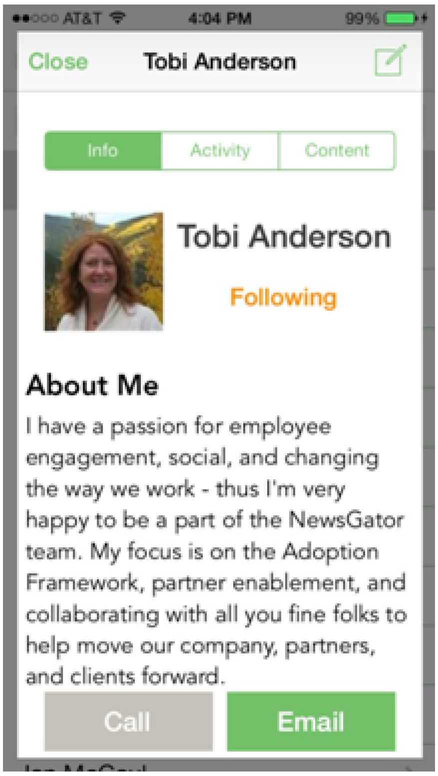
The Colleagues screen shows everyone that you follow in Aurea Social.




*Screenshot 964: Colleagues screen*

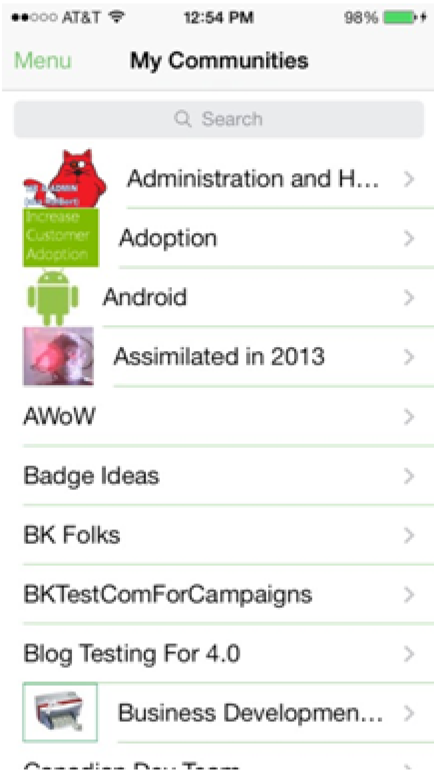
If you tap on a person, you are taken to a detail view page where you can see a person's Info, Activity, and any Content that they've shared in Aurea Social.

From this screen you can also Follow or Unfollow them, as well as contact them via Phone or Email directly from the Aurea Social app.




## Communities

The communities screen includes all communities and spheres that you follow.




*Screenshot 965: My Communities*

By tapping on a community you can view the detail screen.


*Screenshot 966: Detail screen*

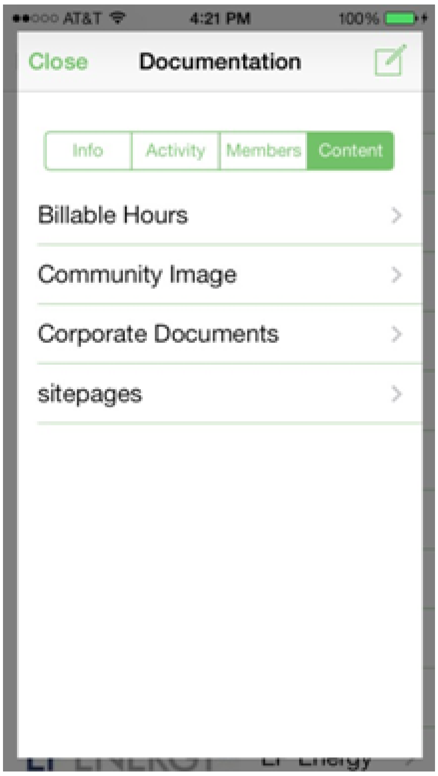
From here, you can see the following:

» all Activity that has been posted to a community
» the Members list
» content that has been uploaded

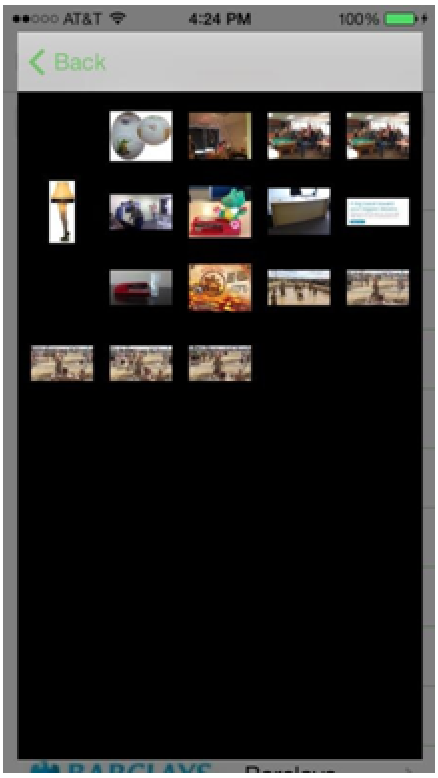
#### Content

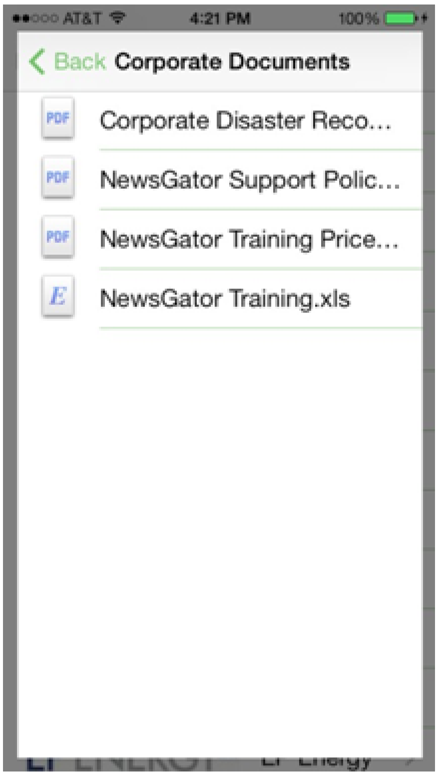
Aurea Social content, such as pictures and documents that have been posted to Aurea Social can be accessed in a number of ways.

From the Colleagues and Communities detail screens, as well as your own Profile, you can see a tab that displays Content.




From the content screen, you can view documents and photos and the Aurea Social app will give you the option to email them or open them in another application on your phone.

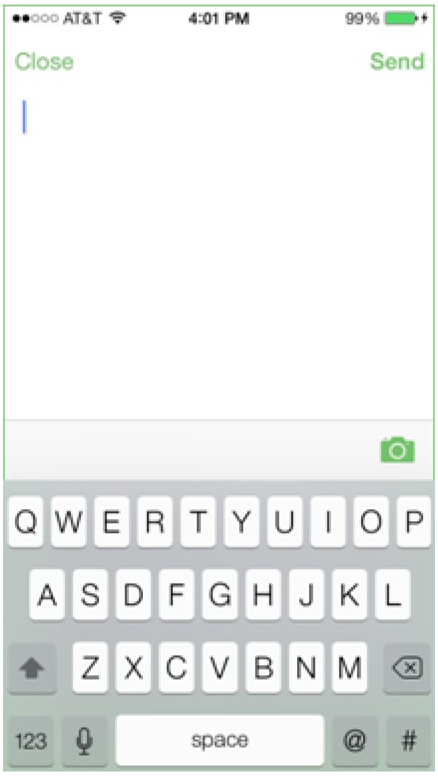



## 1.60.5 Interact

**Microblogging**

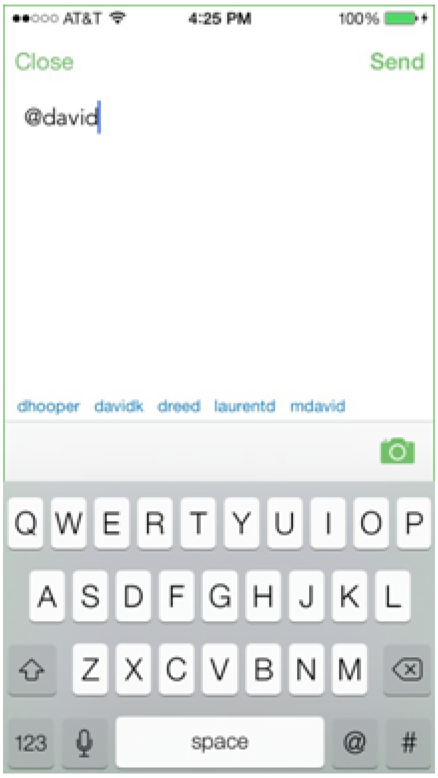
The Compose Message screen allows you to write microblogs and ask questions. You can add a photo to your message by tapping on the camera icon.




*Screenshot 967: Tap camera icon to add foto to your message*

### @targeting and hashtags

The Aurea Social app makes it simple to target communities and people, as well as add hashtags with the tap of a button. When you click '@' or '#' you start to see suggestions for the intended word, person, or community.




*Screenshot 968: The app auto-completes as you type so it's easier to make a selection*

#### Asking questions

To ask a question from the Compose screen, simply end your sentence with a question mark. The app will understand that you're asking a question and it will be posted to Aurea Social as such.

### Marking an answer

Once a question you've posted to the stream has an answer you approve of, you can mark it so others will see the accepted answer.


When viewing the detail screen for your question, simply tap the check mark on the answer you think is best.

#### Commenting and answering

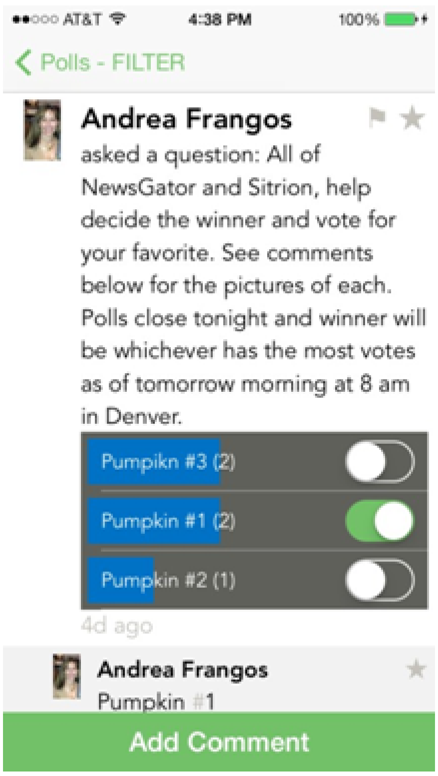
When you tap on a message or question in your stream you will be taken to the detail screen, where you can then Comment or Answer.


*Screenshot 969: Tap on Add Answer button to compose a message*

By tapping on this button you will be taken to the Compose screen.

**Voting in polls**

By tapping on a poll in your stream, you will be taken to the detail screen for it.

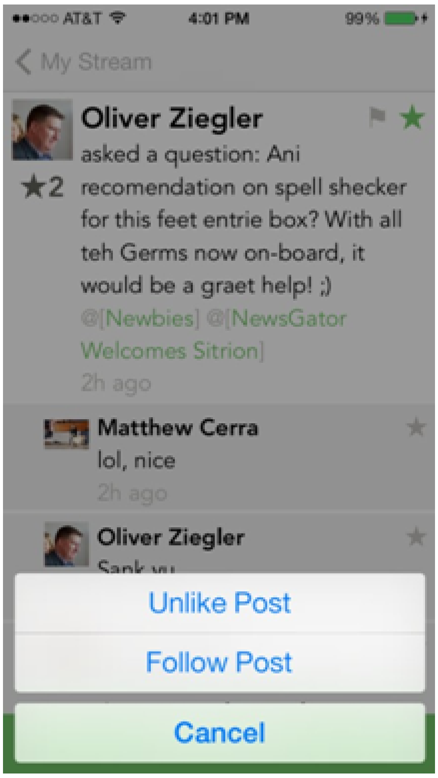



Voting is as simple as tapping toggling the item you would like to vote for. From this screen you can also add a comment.

#### Liking and following-up

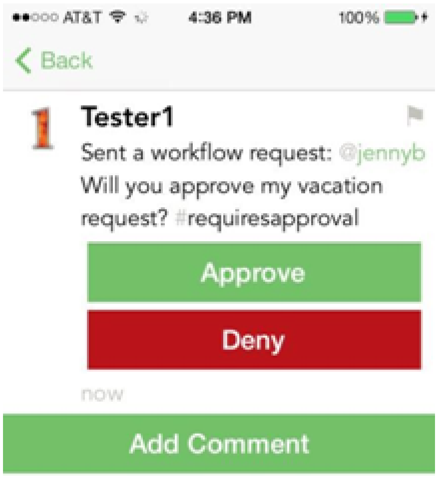
When you are viewing the detail page for a stream item, you can add it to your list of follow-ups by tapping on the flag. To like an item, you can tap on the star. Tapping either the flag or star again will toggle it off.


Alternatively, if you long-tap (tap and hold) on a post, you will see the option to toggle Like or Follow up.



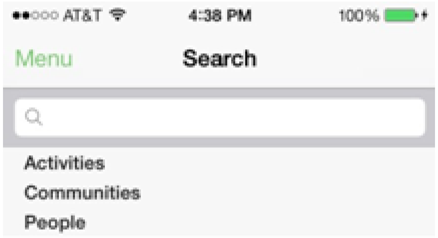

#### Workflow

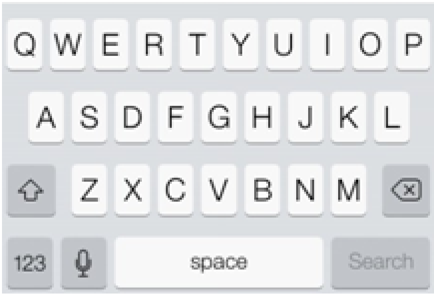
You can create and interact with workflow events in 4.5. The app will convert a private message that contains hashtag #requiresapproval into a workflow event.



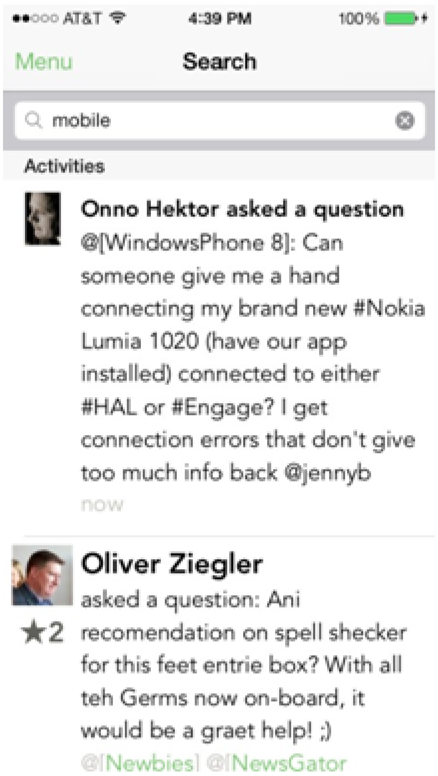

#### Searching

Search can be accessed from the sidebar menu, towards the bottom.




When you perform a search, any Activities, Communities, or People related to the search term will be displayed.




## 1.60.6 My profile

Your profile displays info that you've provided in Aurea Social, as well as your most recent activity and Content that you have shared, including documents and pictures.

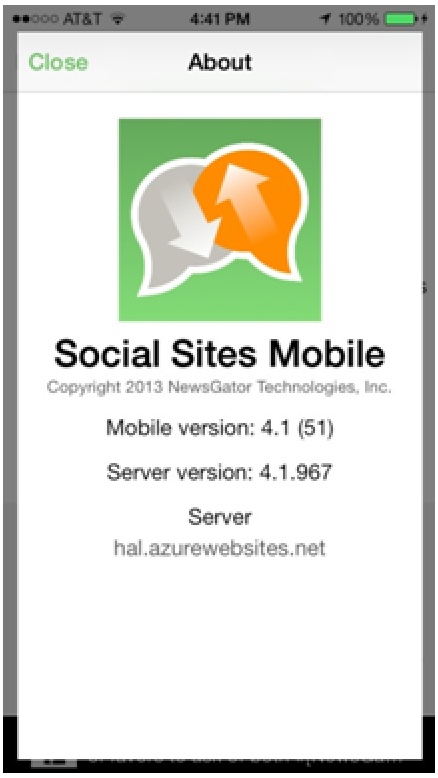

## 1.60.7 About

The About screen provides information about the Aurea Social app, such as the app version and what server you are connecting to.

From this screen you also have the option to log out of the app.

If you are experiencing any issues with the Aurea Social iOS app, from this screen if you double tap the icon you will be show a log that is comprised of latest activity.

From this screen you can send the logs via email.




## 1.61 Android user guide

### Note on versions

The Andriod user guide for the 4.5 verion of the Android app is included here for convenience. Please see specific release notes for current functionality.

> **Note:**
> As of March 2017, support for MDM-integrated versions of the Aurea Social native clients has ended.

### Features – Android

The Aurea Social Android app accompanies Aurea Social on SharePoint, giving you access to your Aurea Social colleagues, communities and their associated activities on your Android phone or tablet.

### 1.61.1 Getting started

**Device requirements**

Aurea Social for Android requires OS 2.2 and above, and will work on both on Android phones and on tablets. The app works with Aurea Social server versions 3.1 and above. If you're not sure what server version you are using, contact your IT administrator.

**May, 2014 - There is an issue with Android OS (KitKat V4.4.2):**

**Problem:** Mailto links are entirely entered into the address field instead of being parsed into Address, Subject and Body

**Impact:** Clicking on any links within an email (e.g. Instant Notifcations, digest email links like 'like', 'comment', etc) will not parse correctly back into the Android Email client, thus the email will fail to send.

**Fix:** Currently there is no fix we can put into our product to work around this. We are awaiting a patch OS release from Android to fix this issue.

**Download and install**

Aurea Social for Android can be downloaded by following this link:
https://play.google.com/store/apps/details?id=com.newsgator.android.SocialSites&feature=nav_result#?t=W251bGwsMSwyLDNd

**Logging in**

When you first launch the app, you will see the log in screen.

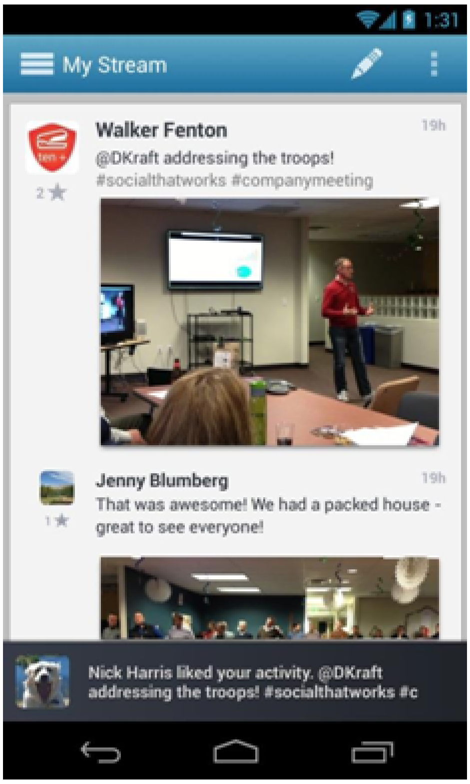

*Screenshot 970: Log in screen*

Provide your network credentials to access Aurea Social. You can elect to show your password as you type it in by tapping **Show** when that field is highlighted.

If you aren't sure what your credentials are, or what the domain and server fields should be, contact your IT administrator.

## 1.61.2 My Stream

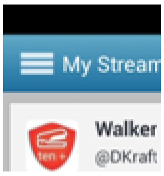
The first thing you'll see when you sign into the app is a view of your Stream. This is a collection of activity made up of all the people, activities, and communities that you follow.




*Screenshot 971: View of My Stream*

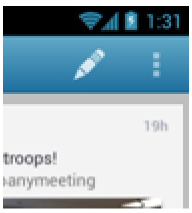
Let’s have a look at some of the elements that make up the **My Stream** screen:

**Sidebar menu**




Click  on the top left-hand corner of the screen to access all of the other screens in the app. You can either tap the button, or you can open the sidebar by swiping from left to right on the screen.

**Compose button**

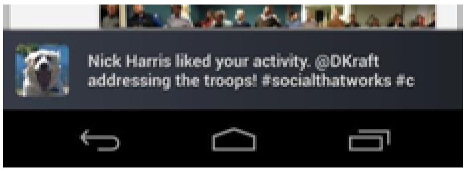



The compose button  in the top right-hand corner of the screen is how you compose messages and ask questions.

**Stream items**


Individual posts in the stream can be viewed by tapping on them. From here you can comment, like, flag for follow-up, or if it's a question, answer it.

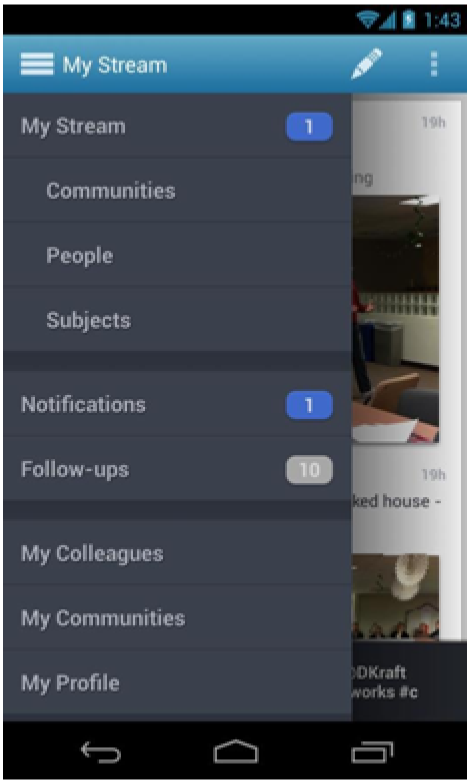
**Notification bar**




If you have any unread notifications they will appear in a black bar at the bottom of the screen. By tapping on this bar you can view all notifications for you.

## 1.61.3 Navigate

Navigating around the Aurea Social app is primarily done from the sidebar menu, accessed by either the menu button in the top left-hand corner of the screen, or from swiping from left to right.




*Screenshot 972: Sidebar menu navigation for Aurea Social app*

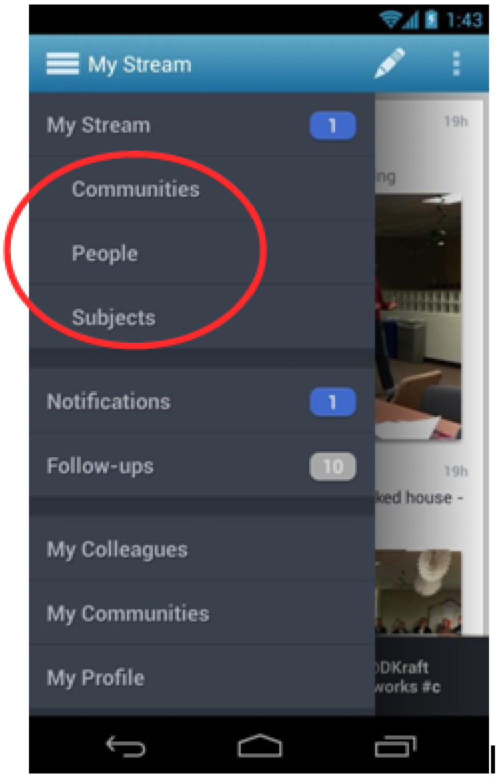
You can access your Stream or the tiles within your stream that you've setup through Lookout.

Below your tiles are Notifications, Follow-ups, your Colleagues, Communities, Profile, an option to search Aurea Social, and the Aurea Social app About page.

## 1.61.4 View

**My Tiles**

In Aurea Social Lookout on the web you have control over what tiles appear based on what content you would like to see. The Aurea Social app will reflect how you've curated your experience.



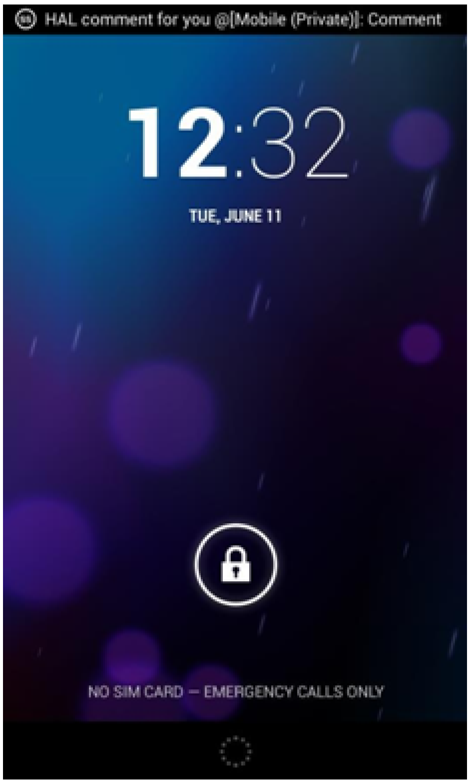

In the above screenshot depicting the sidebar navigation, the tiles are **Communities**, **People**, and **Subjects**.

#### Notifications and follow-ups

### Push notifications

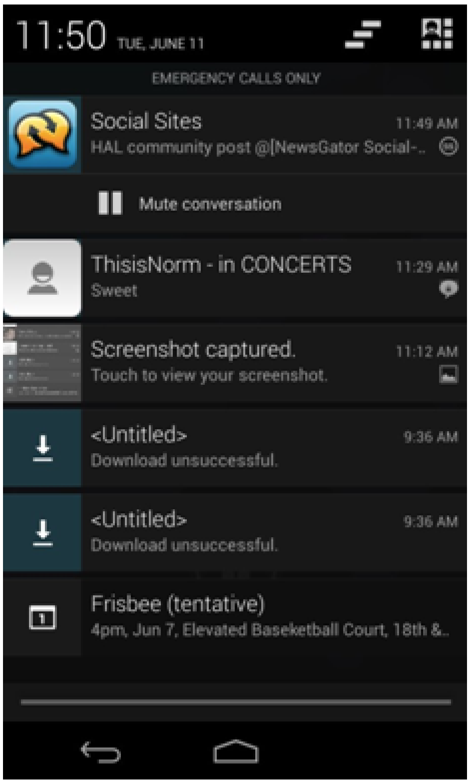
If you are using the Aurea Social Android app against Aurea Social server version 4.5 or 5.0, you can elect to receive push notifications from the app.

For every item you've elected to receive a notification for in Aurea Social, you will see a notification on your lock screen. If you tap the notification you will be taken to the post in the Aurea Social app.

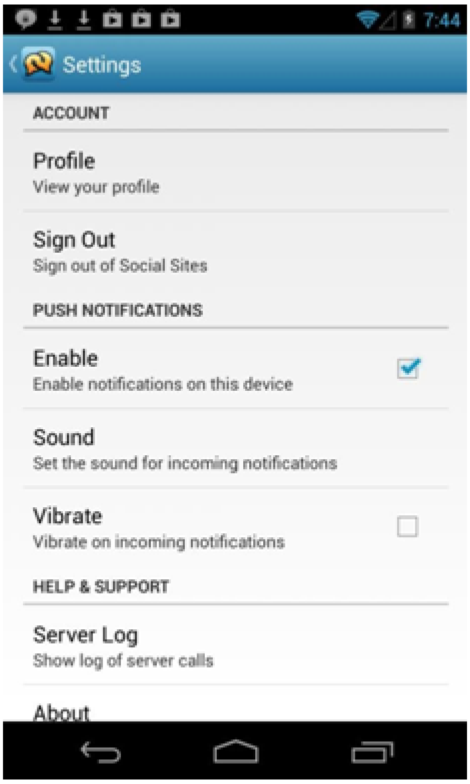



*Screenshot 973: Lock screen*

Push notifications will appear in Notification Center on your phone. You can view by swiping downwards on your device. Swipe to the side to clear a notification. If you would like to opt out of receiving further notifications for a particular post, you can mute it here.

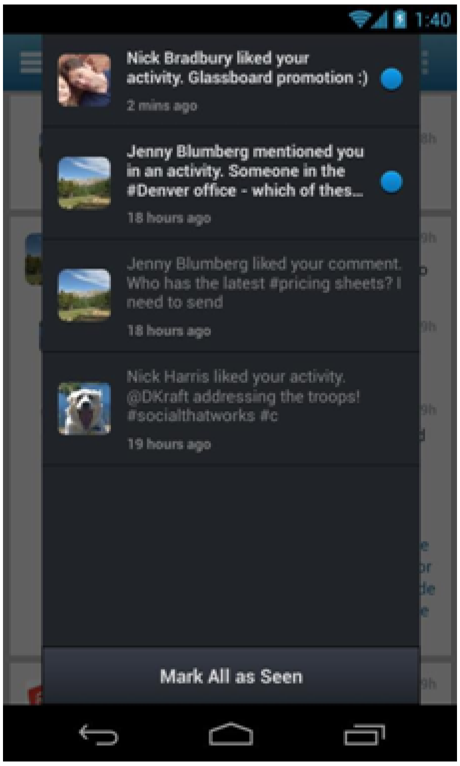



To toggle push notifications off or on, navigate to the Settings screen and select to disable or enable.




### In-app notifications

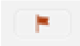
The notifications screen can be accessed either from the sidebar menu, or from the aforementioned black bar that will appear on the bottom of your stream.




This screen shows all notifications. Unread notifications have a lighter font and a blue dot next to them, while notifications you've already viewed don't stand out quite as much.

### Follow-ups

The follow-ups stream contains items that you've flagged for follow-up.

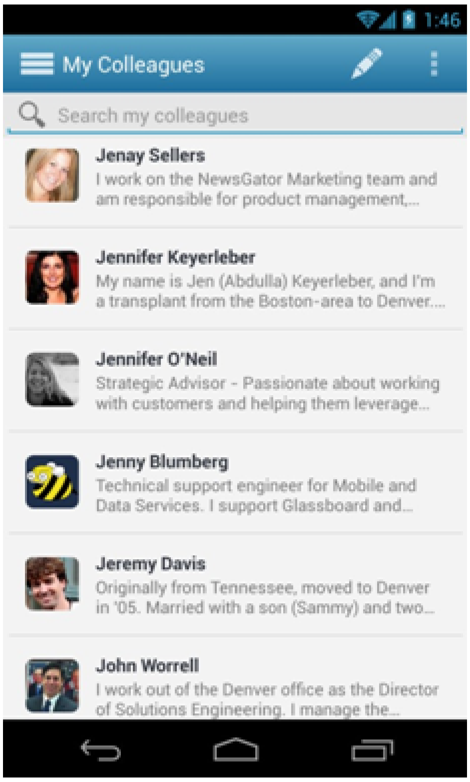


You can toggle any stream item for follow-up or not by tapping on the flag icon for a post.

**Colleagues and communities**

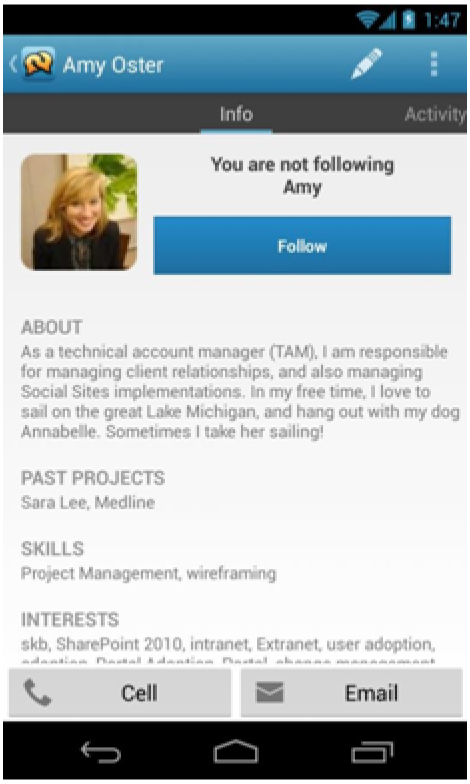
## Colleagues

The Colleagues screen shows everyone that you follow in Aurea Social.




*Screenshot 974: My Colleagues*

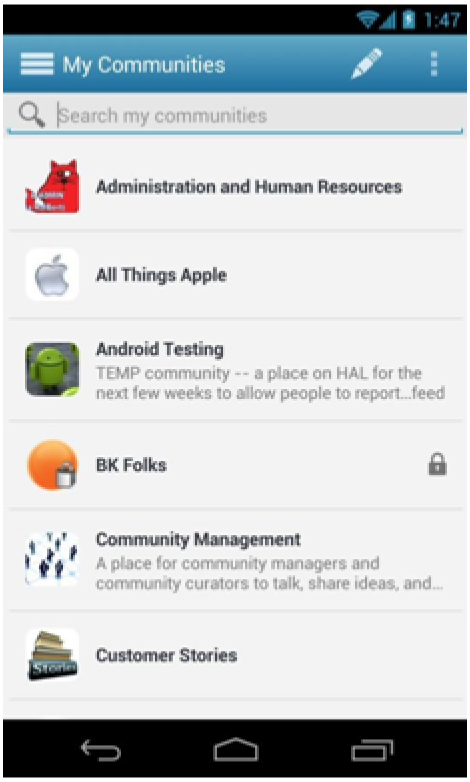
If you tap on a person, you are taken to a detail view page where you can see a person's Info, Activity, and any Content that they've shared in Aurea Social. From this screen you can also Follow or Unfollow them, as well as contact them via Phone or Email directly from the Aurea Social app.




*Screenshot 975: Detail view page of a person*

## Communities

The communities screen includes all communities and spheres that you follow.



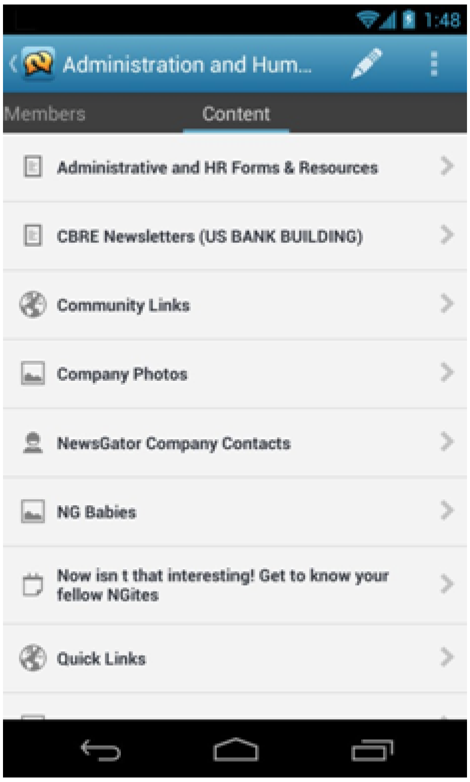

*Screenshot 976: My Communities*

By tapping on a community you can view the detail screen.

From here, you can see all Activity that has been posted to a community, the Members list, and Content that has been uploaded.

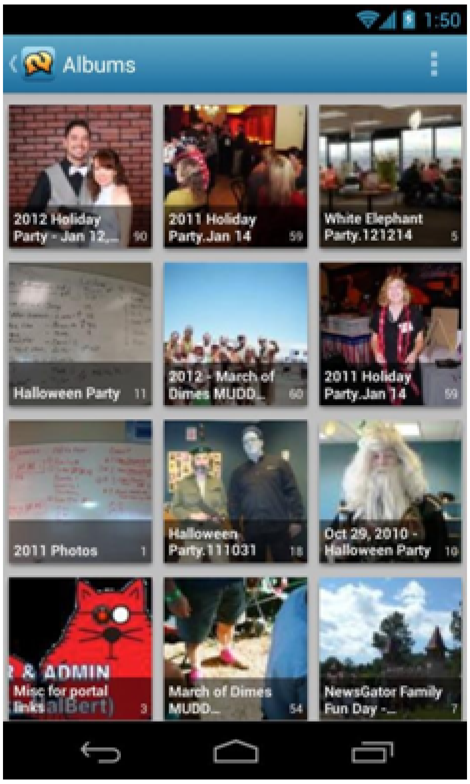
**Content**

Aurea Social content, such as pictures and documents that have been posted to Aurea Social can be accessed in a number of ways. From the Colleagues and Communities detail screens, as well as your own Profile, you will see a tab that displays Content.

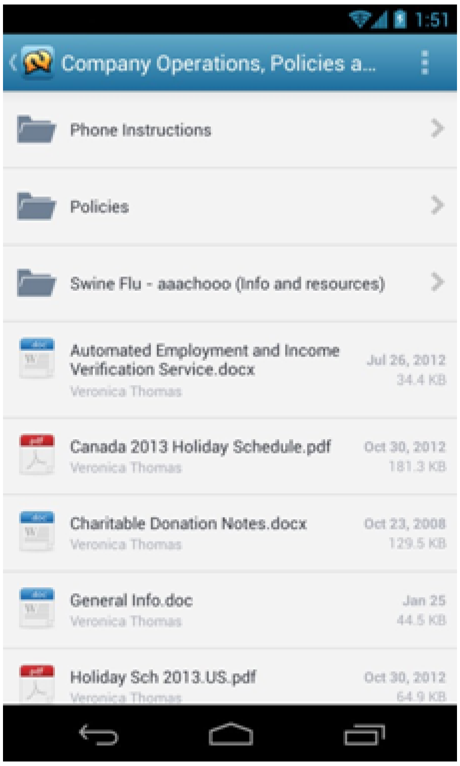



*Screenshot 977: Content*

From the content screen, you can view documents and photos and the Aurea Social app will give you the option to email them or open them in another application on your phone.



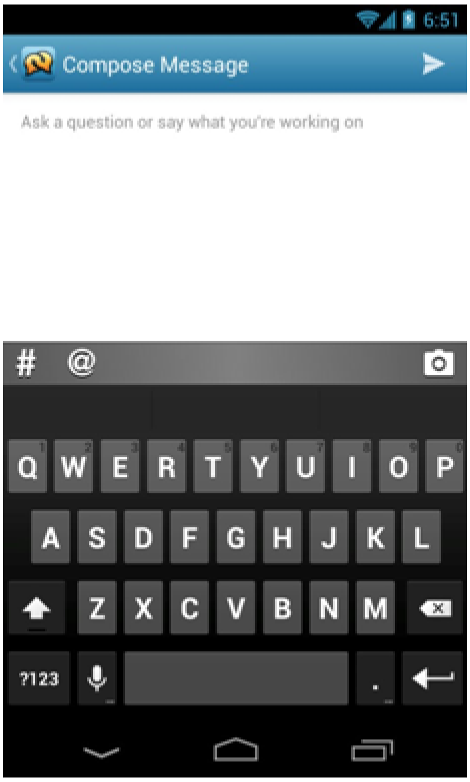

*Screenshot 978: Albums*




## 1.61.5 Interact

**Microblogging**

The Compose Message screen allows you to write microblogs and ask questions. You can add a photo to your message by tapping on the camera icon.

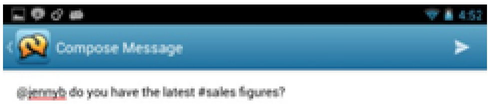


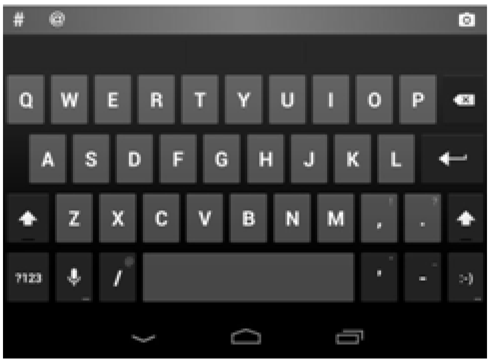

*Screenshot 979: Compose Message*

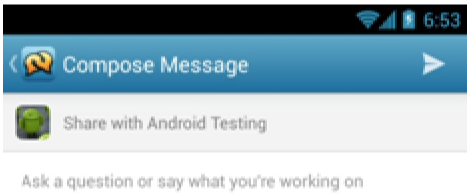
**@targeting and hashtags**

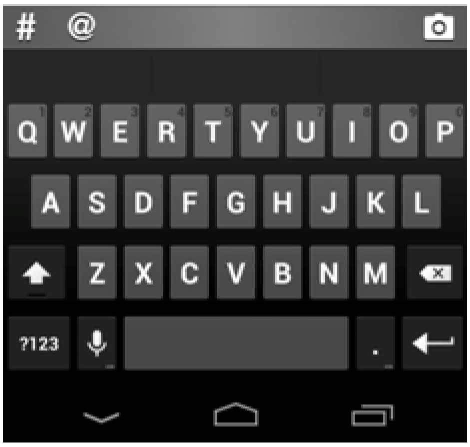
The Aurea Social app makes it simple to target communities and people, as well as add hashtags with the tap of a button.

When you tap '@' or '#' you will be taken to a screen that lets you search for the intended word, person, or community. The app will autocomplete as you type so it's easier to make a selection.



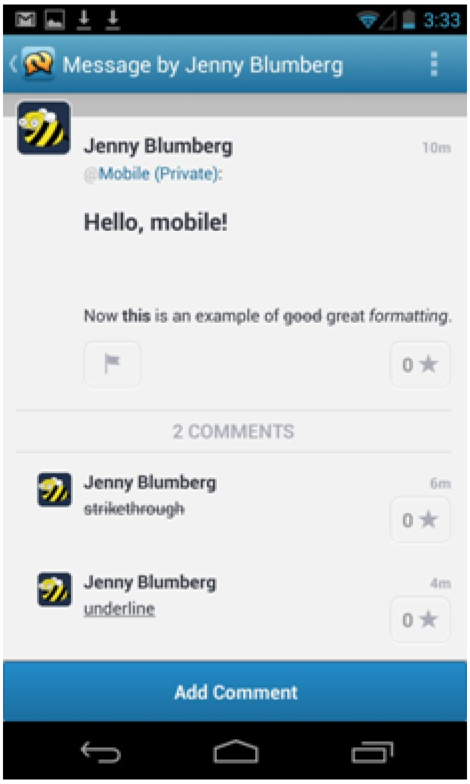


## Post formatting

The apps allow formatting of microblogs and questions by use of BBCode syntax. The Android app supports the display of the following:

- [b] bold [/b]
- [i] italics [/i]
- [u] underline [/u]
- [del] strikethrough [/del] [h1] header1 [/h1]
- [h2] header2 [/h2] [h3] header3 [/h3] [h4] header4 [/h4] [h5] header5 [/h5] [h6] header6 [/h6]
- [code] source code or script [/code]



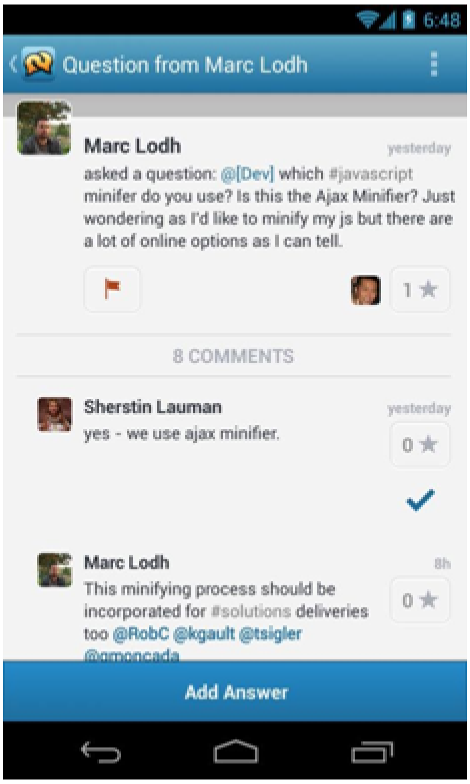

*Screenshot 980: Formatted Message*

**Asking questions**

To ask a question from the Compose screen, simply end your sentence with a question mark. The app will understand that you're asking a question and it will be posted to Aurea Social as such.

### Marking an answer

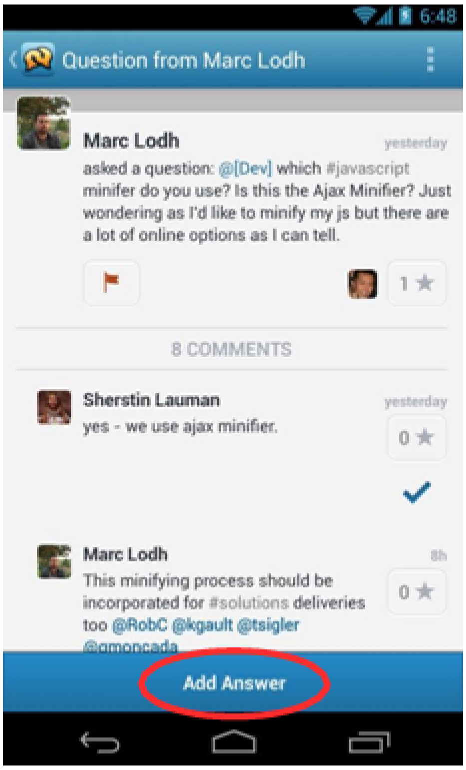
Once a question you've posted to the stream has an answer you approve of, you can mark it so others will see the accepted answer.




When viewing the detail screen for your question, simply tap the check mark on the answer you think is best.

**Commenting and answering**

When you tap on a message or question in your stream you will be taken to the detail screen, where you can then Comment or Answer.

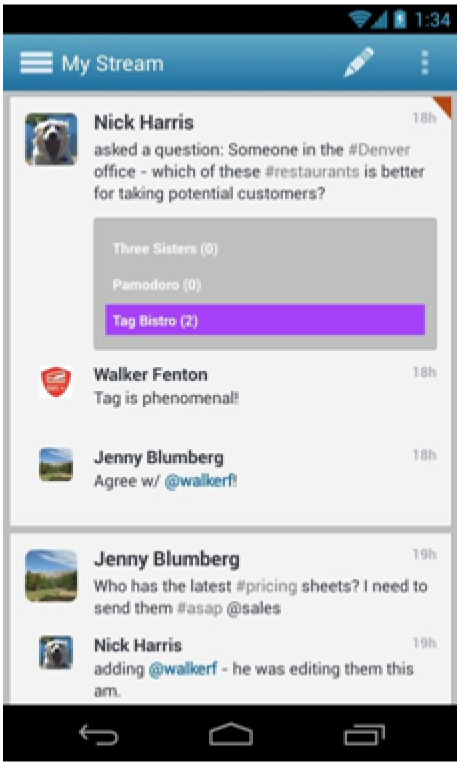



*Screenshot 981: Add Answer*

By tapping on this button you will be taken to the Compose screen.

#### Voting in polls

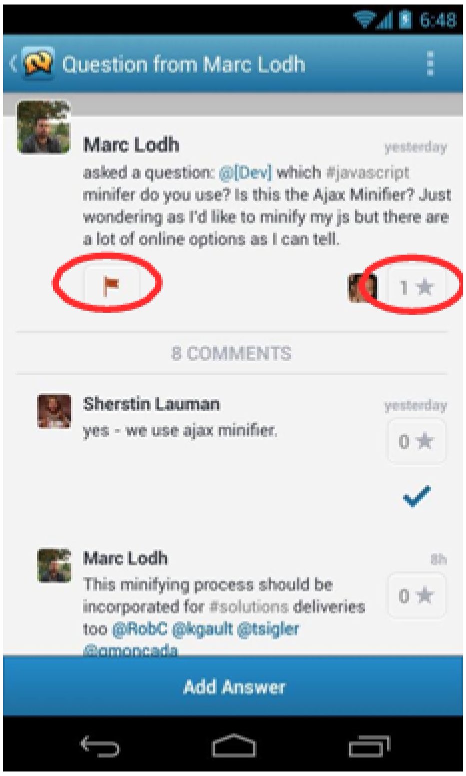
By tapping on a poll in your stream, you will be taken to the detail screen for it.




*Screenshot 982: Tap an item to vote*

Voting is as simple as tapping the item you would like to vote for.

#### Liking and following-up

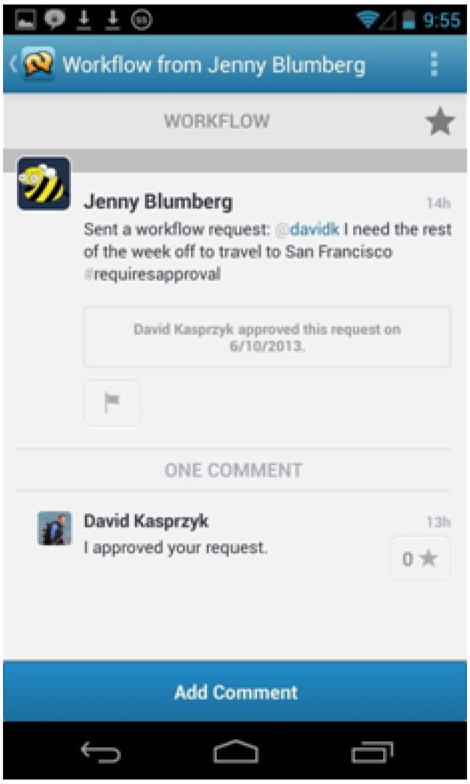



*Screenshot 983: Tap flat to follow and star to like*

When you are viewing the detail page for a stream item, you can add it to your list of follow-ups by tapping on the flag. To like an item, you can tap on the star. Tapping either the flag or star again will toggle it off.

#### Workflow

You can create and interact with workflow events in 4.5. The app will convert a private message that contains hashtag #requiresapproval into a workflow event.




*Screenshot 984: Workflow event*

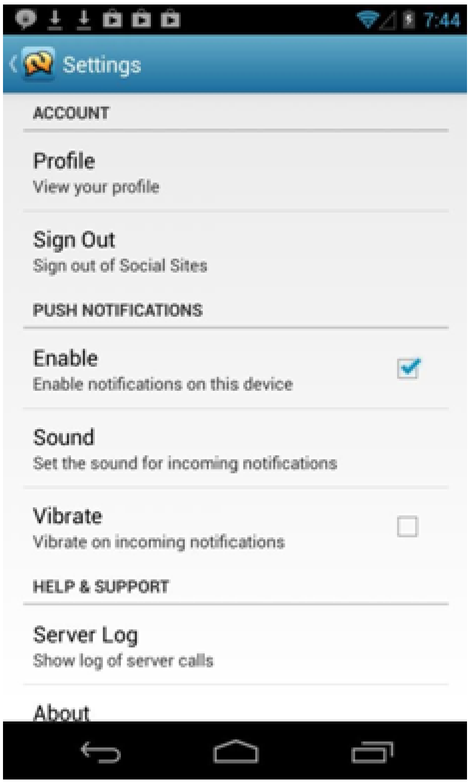
### Searching

Search can be accessed from the sidebar menu, towards the bottom.

When you perform a search, any **Activities**, **Communities**, or **People** related to the search term is displayed. The app will remember search terms that you have used previously.

## 1.61.6 Settings

The following screens can be accessed by tapping on the Settings button on your Android phone. There is also an option here to refresh the stream.




*Screenshot 985: Settings*

**Profile**

Your profile displays info that you've provided in Aurea Social, as well as your most recent activity and Content that you have shared, including documents and pictures.

**Sign Out**

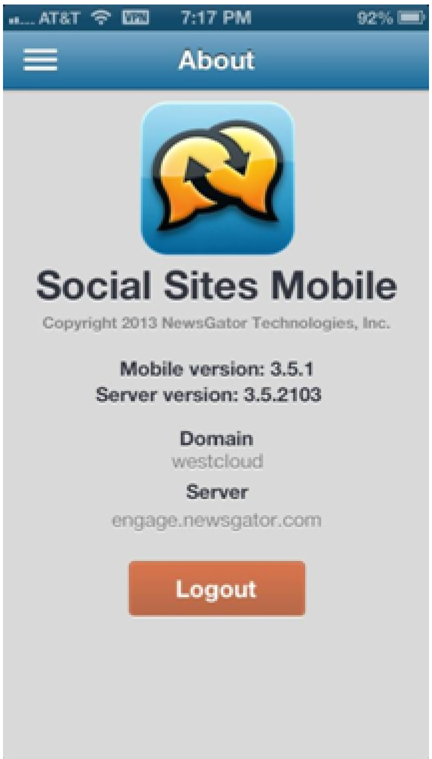
This option logs you out of the app, in the case where you need to connect to a different Aurea Social server or change your credentials.

**About**

The About screen provides information about the Aurea Social app, such as the app version and what server you are connecting to. From this screen you also have the option to log out of the app.

Push notification settings can be toggled from this screen.

Finally, if you are experiencing any issues with the Aurea Social Android app, the Server Log option will take you a screen of the most recent activity by the app. You will see an option to share logs from here via email.



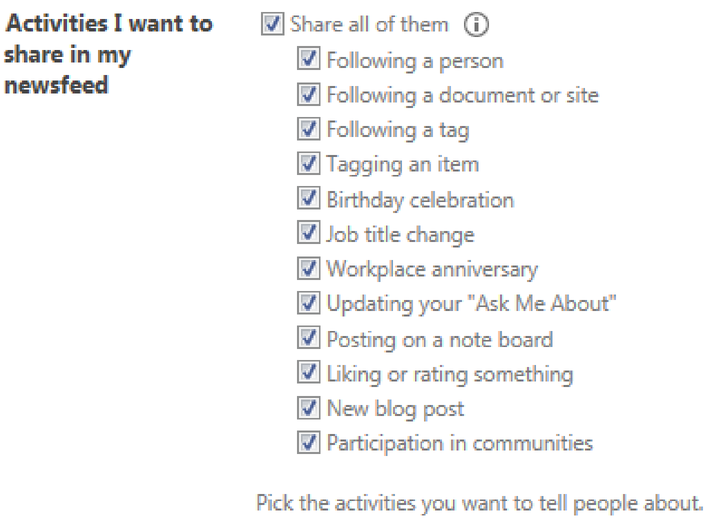

*Screenshot 986: About*

## 1.62 Aurea Social 2013 Vs 2010 Activity Stream

How the Aurea Social 2013 Activity Stream differs from the Aurea Social 2010 Activity Stream?

This section details differences in functionality for Aurea Social on SharePoint 2013. While the majority of items in the Aurea Social activity stream work in exactly the same way, changes in SharePoint 2013 mean that users may see some activity stream items that come only from SharePoint.

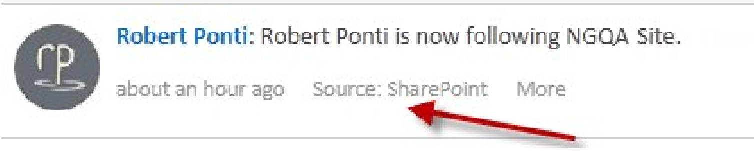
In general, the list of events that could come from SharePoint 2013 is shown in the Newsfeed Settings portion of the profile edit page.




*Screenshot 987: List of events*

When Aurea Social is installed, blog post events and participation in communities come from Aurea Social.

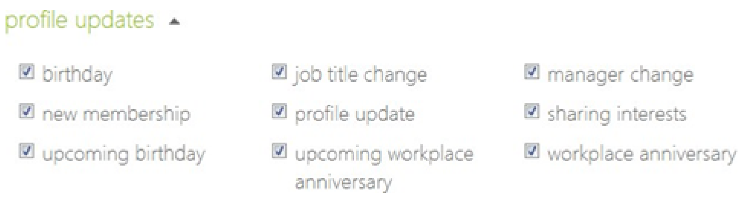
When viewing the activity stream if SharePoint events are available, they are added into the default view.




SharePoint events have a **Source: SharePoint** label at the bottom and do not include controls that are available on other Aurea Social activities (such as like or comment).

Clicking the **Source: SharePoint** link opens a SharePoint display page. In almost all cases, SharePoint also does not have any additional interactions available on these items. But if there are additional options available, users can take those actions on this page.

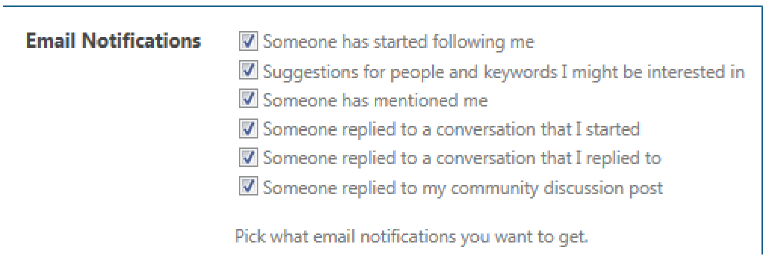
Because these events are generated directly in SharePoint, Aurea Social does not have the ability to screen them out for users. Correspondingly, de-selecting these event types (e.g. birthday) in the Aurea Social stream settings dialog does not prevent them from displaying in the activity stream.




*Screenshot 988: Profile updates*

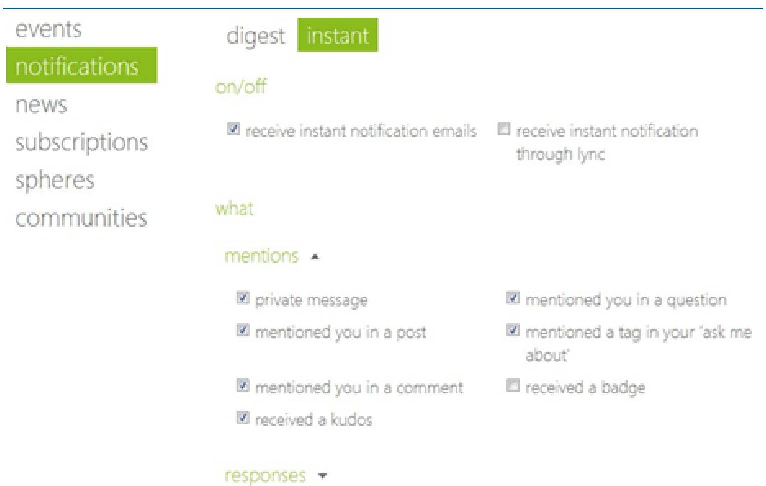
The SharePoint checkboxes listed on the prior page control the creation of these events but do not filter them for displaying for the user.

Similarly, SharePoint contains a set of notification options in the Newsfeed settings page.




*Screenshot 989: Notification options*

Only the first three of these notification options actually apply because Aurea Social takes care of the other notifications and provides additional granularity of notification controls in its notifications options accessed via the Settings link.

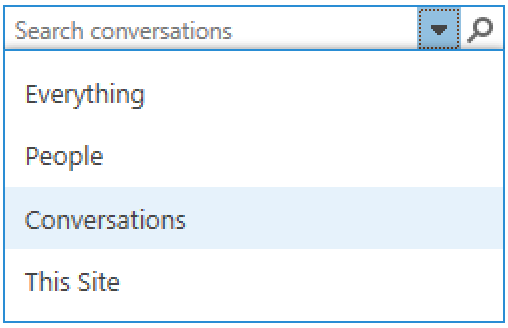



*Screenshot 990: Notification controls*

With Aurea Social installed, all microblogs should be stored in the Aurea Social database.

This allows them to have all the flexibility of being targeted at any number of communities, supporting private message microblogs, etc. SharePoint 2013 includes some default search views designed to show microblogs stored in lists.

On the My Site, it's best to scope the search control to not include conversations.




*Screenshot 991: Conversations*

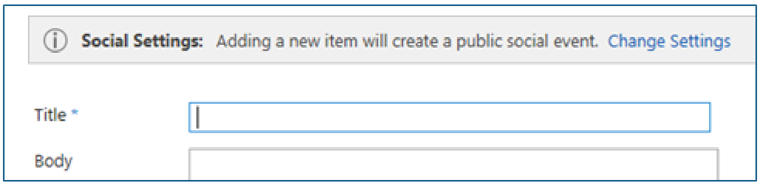
On the search center results page, the **Newsfeed post** filter typically does not show any results.


*Screenshot 992: Result type*

The personal blog on the Newsfeed site gets Aurea Social event receivers activated by default.

This ensures the best display of blog events and synchronization of comments with the stream. If the Aurea Social event creation is turned off, SharePoint may still generate activity stream events through its own event receivers.

Aurea Social adds a message at the top of new blog post screen to indicate if Aurea Social events are being generated.




*Screenshot 993: Social Settings*

Because the Aurea Social activity stream has additional types of events and interactions that are not supported in the SharePoint activity stream, the Aurea Social mobile, desktop and Outlook Plugin clients are required to interact with the stream.

Accessing SharePoint with the Microsoft mobile clients allows reading and interacting with built-in microblogging, but does not allow accessing the full Aurea Social stream.

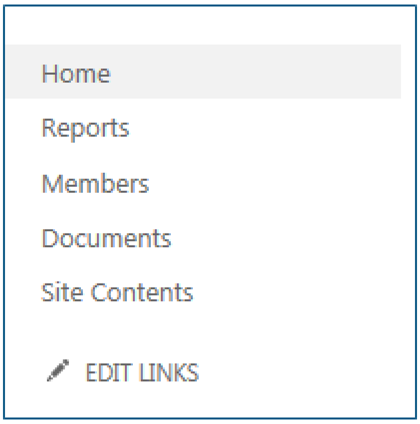
Because the native SharePoint events such as profile updates do not create events which are actually stored in the Aurea Social database, they do not show up in reports or be effective for badge rules in Spotlight.

Spotlight badge rules that count total colleagues, followers and community following are still effective.

## 1.63 Aurea Social communities -2010 Vs 2013

### Non-owners see Reporting web parts by default

By default, several navigation links are added by Aurea Social to the Quick Nav on the left of a Team site.

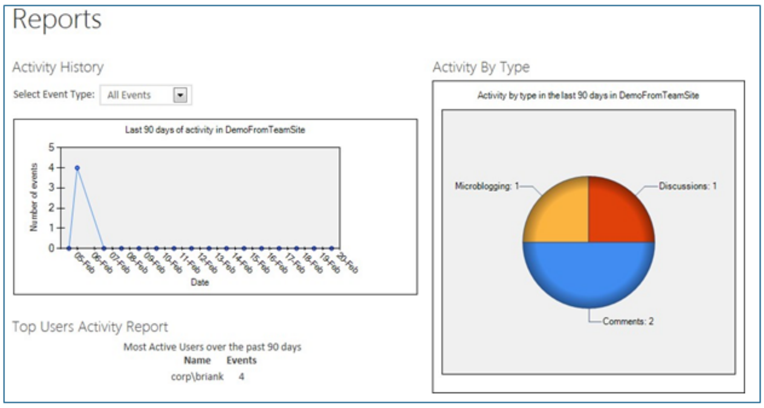



*Screenshot 994: Quick navigation*

Reports gives access to the Aurea Social activity reports. In 2010, these are only shown automatically to site owners, as they are deployed to the Admin tab by default.

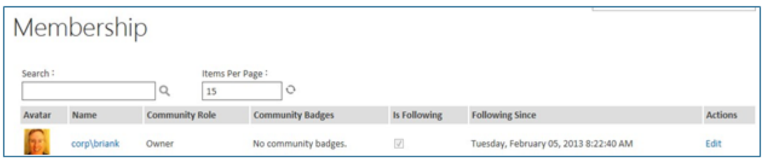
Site owners can change permissions or remove the link to restrict access.

> **Note:**
> 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.




*Screenshot 995: Aurea Social Activity reports*

The Members link gives access to the Aurea Social community members page.




*Screenshot 996: Membership page*

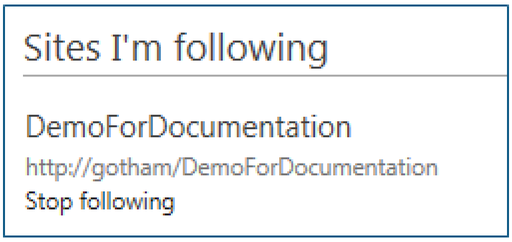
## Managing which communities you follow

SharePoint 2013 provides new ways to follow and unfollow sites, and to see an overview of your followed sites, that in 2010 are provided by Aurea Social web parts for community sites.

Following communities is done via the SharePoint 2013 “follow site” control in the upper right of the page.


With Aurea Social installed, this control toggles when you click on it to show that you are following the site.


Communities that you are following are tracked within Aurea Social as well as on the **Sites I'm following** list accessed from the **Sites** link in the top navigation.




*Screenshot 997: Communities followed by you*

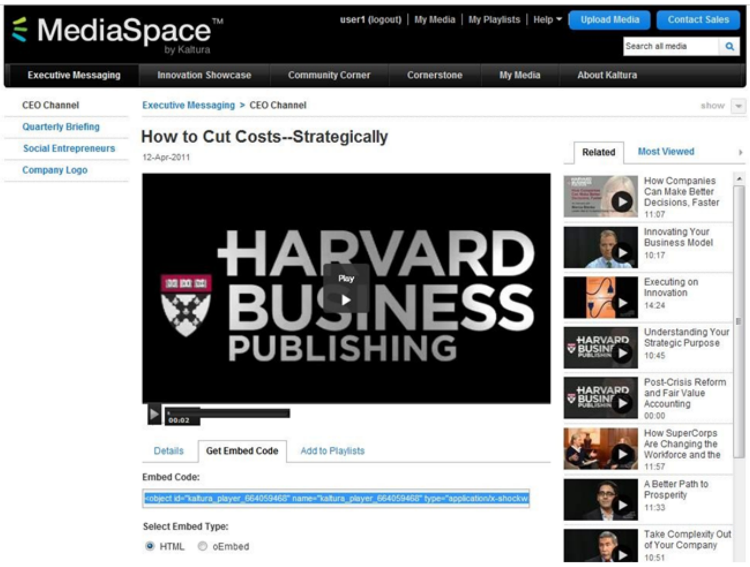
Users can choose to stop following a site from this list or from the control on the actual site. Hovering the mouse over the **Following** text displays the **Stop Following** option.


*Screenshot 998: Hover mouse over Following*

## 1.64 Embedding a Kaltura Video in the stream

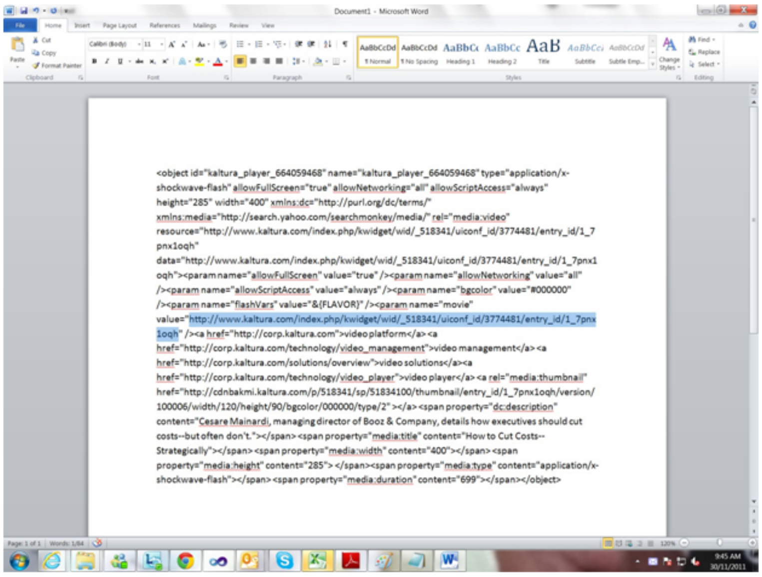
To embed a Kaltura video (hosted by a Kaltura MediaSpace site) into Video Stream, do the following:

1. Go to your **Kaltura Media Space implementation** and copy the embed code.



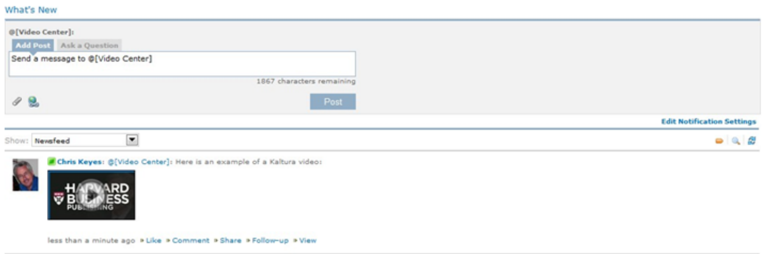

*Screenshot 999: Embed code*

2. Paste the embed code into an editor and then copy the URL containing the word “kwidget”.

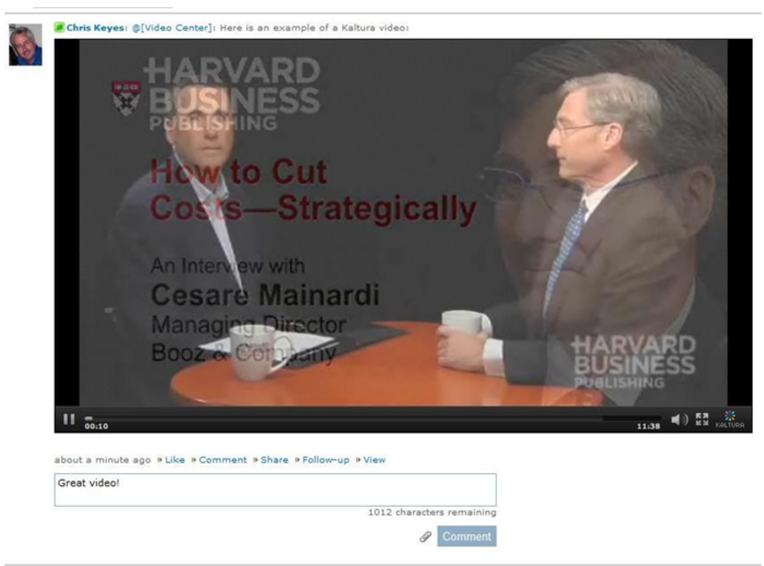


*Screenshot 1000: Copy the URL containing the word “kwidget”*

3. Paste this subset of the embed code into a micro-blog post. After posting the micro-blog entry, the thumbnail appears in the stream.

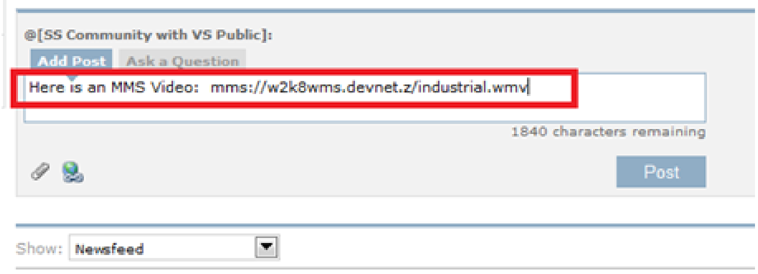

4. Click on the thumbnail and the video plays inline. The Kaltura video can then be viewed, commented-on and liked.




## 1.65 Embedding an MMS video in the stream

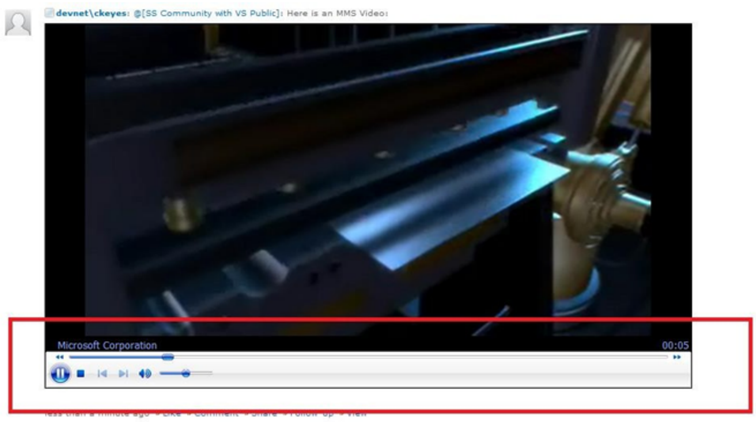
To embed an MMS (Microsoft Multimedia Service), do the following:

1. Copy the URL into a micro-blog post.




2. See the new stream entry with the thumbnail for the player (no thumbnail or title is readily available in a default configuration).


3. Click on the thumbnail to view the MMS video in-line with the Windows Media Player.



## 1.66 Screencast hot key support

Screencast supports a number of hot key options:

Start Recording (full or partial screen):

- PrintScreen
- Shift-Print-Screen
- Alt-Print-Screen
- Ctrl-Print-Screen
- PageUp
- Shift-PageUp
- Alt-PageUp
- Ctrl-PageUp

Stop Recording (full or partial screen):

- Pause
- Shift-Pause
- Alt-Pause
- Ctrl-Pause
- PageDown
- Shift-PageDown
- Alt-PageDown
- Ctrl-PageDown

## 1.67 Deploying Screencast with basic authentication

The NewsGator ScreenCast application is packaged as a Microsoft ClickOnce application. On SharePoint, a ClickOnce application requires NTLM authentication.

SharePoint sites with Basic authentication with not allow downloading the NewsGator ScreenCast application.

Workarounds:

» If your corporate or IT policy allows for it, you can set authentication of your SharePoint sites to use NTLM instead of Basic authentication.

» If your corporate or IT policy does not allow you to modify the site authentication, you can copy the NewsGator ScreenCast download location on a network drive and provide a link on the Video Stream page to point to this Windows File Share.

# Miscellaneous

Below are some miscellaneous topics related to Aurea Social:

## 1.68 Installing AppFabric for Aurea Social

This is an installation guide for AppFabric for Aurea Social.

### 1.68.1 Installing AppFabric for Aurea Social

This is an installation guide for AppFabric for Aurea Social.

#### Why use Windows Server AppFabric cache?

AppFabric cache for Windows Server is a distributed cache environment that can be shared across multiple servers.

It eliminates the problem of caching to memory on individual servers in a multi-front-end scenario, which could cause data discrepancies among your front-end servers.

AppFabric cache allows the following enhancements to the Aurea Social Software:

» Suggest Ahead capabilities. Suggest Ahead queries the cache as you type to suggest similar posts, questions and communities.

» Activity Stream caching. This can speed up the loading of the Activity Stream by several seconds.

» Community Activity Stream caching (introduced in v5.2). This also speeds up the loading of the Community Activity Stream.

#### Pre-requisites

Below are the pre-requisites to installing App fabric on Aurea Social:

» .Net 4.0 Installed

» AppFabric Service Account and Password (typically a domain account). This account needs no special rights as the AppFabric configuration will assign appropriate rights.

» A Microsoft SQL instance on which to host the AppFabric configuration database. The account you are logged into the server with needs to be able to create databases and assign security rights on that SQL instance.

Alternatively, the configuration could live in an XML document on a file share. In the case of the XML on a file share, the AppFabric service accounts needs read/write access to that file share.

#### Installation and configuration

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

It is recommended that AppFabric Cache be installed on a server of its own with a minimum of 4 gigs of RAM.

Windows Update service must be running.

Execute the UI based installer.

#### Install AppFabric

Below are the steps to install AppFabric:

1. Remotely access each of the App Fabric Servers.

2. Copy the AppFabric Installer to the local system.

3. Copy `AppFabricSitrion.zip` to the local system. Right-click, choose properties and unblock if needed.

4. Extract AppFabricSitrion.zip to the local system.

5. Ensure that the Window Update Service is running. Open `Services.msc`.

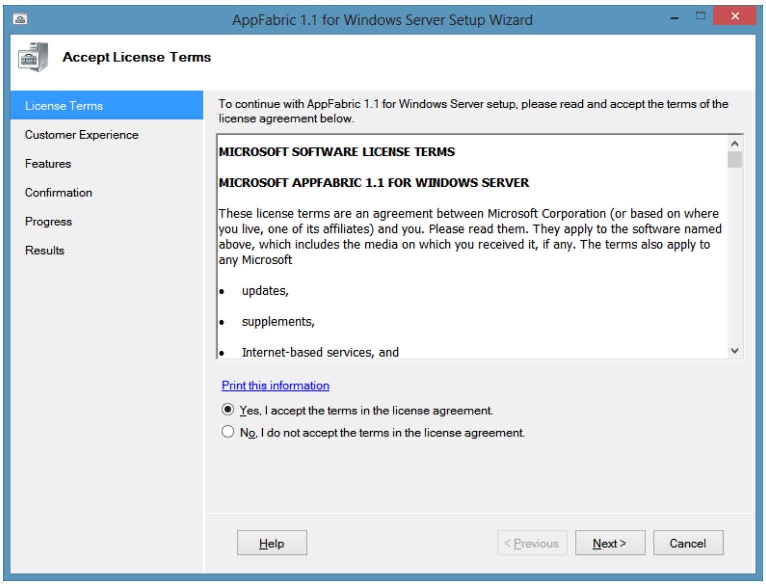
6. Scroll down and find Windows Update. Start it if it is not already started.

7. Open Windows Explorer.

8. Navigate to the folder where the Ap Fabric install file is located

9. Execute UI Installer.

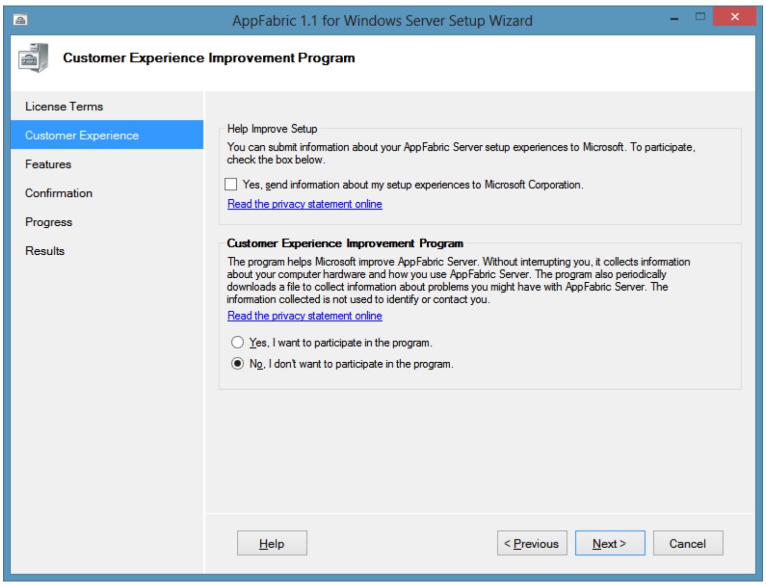
10. The first Screen, **Accept License Terms** is displayed.




*Screenshot 1001: Accept license terms screen*

11. Select Yes, I Accept the terms in the license agreement. Click **Next**.

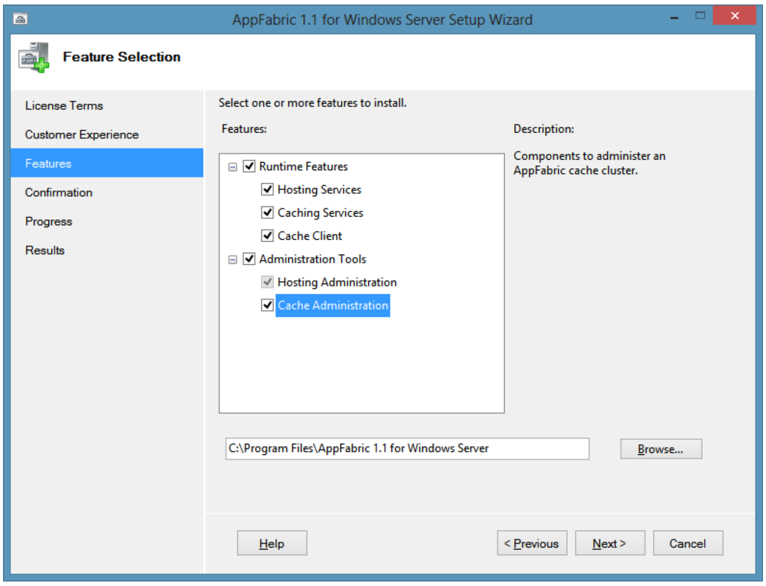
12. The next screen, **Customer Experience Improvement Program** is displayed.




*Screenshot 1002: Customer Experience Improvement Program page*

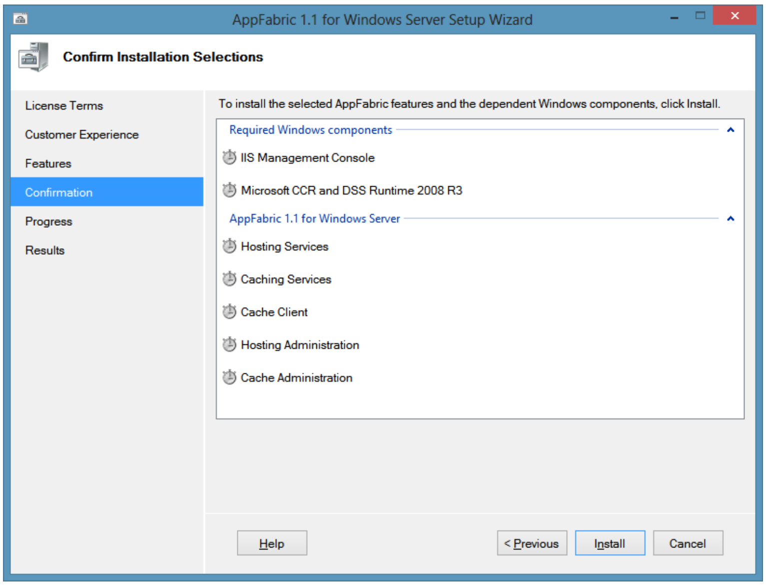
13. Click **Next**. **Feature Selection** screen is displayed.

14. Select all option on **Feature Selection** screen and click **Next**.



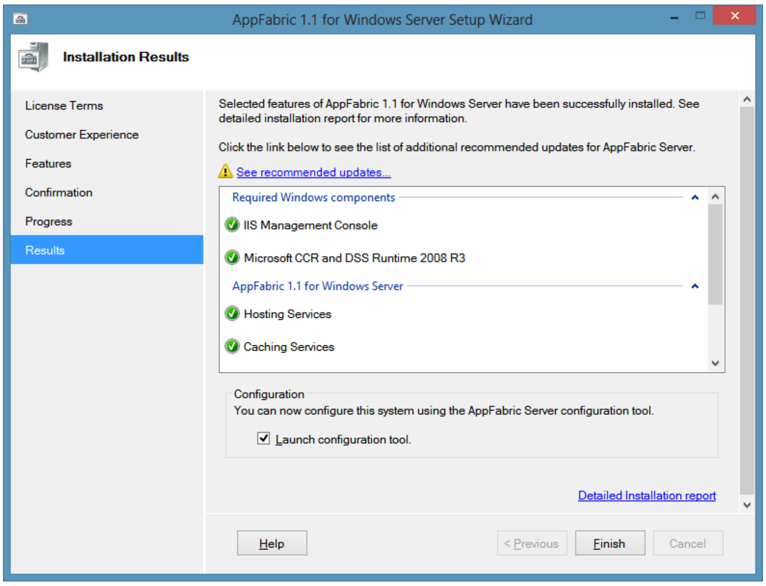

*Screenshot 1003: Enable all check boxes*

15. **Confirm Installation Selections** screen is displayed. Click **Install**.




*Screenshot 1004: Confirm Installation Selections screen*

16. The installer displays the progress screen during the installation and then displays **Installation Results** screen.

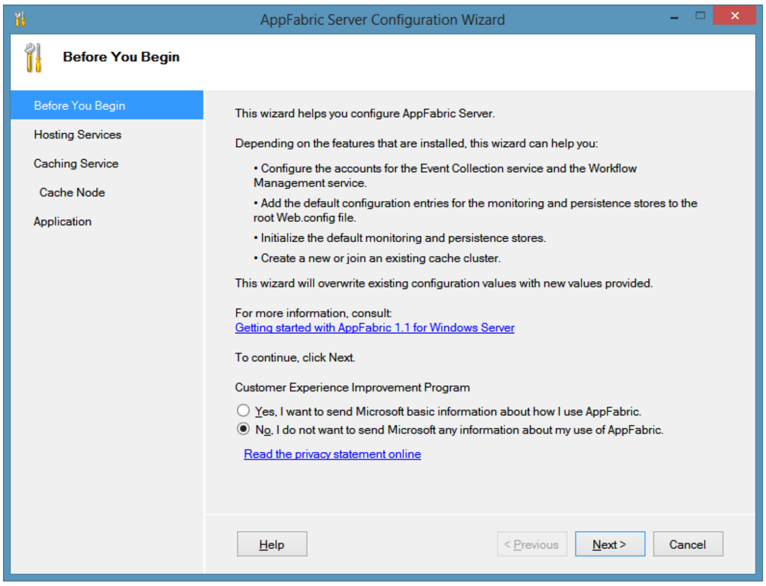



*Screenshot 1005: Installation Results screen*

17. Ensure **Launch configuration** tool is ticked and click **Finish**.

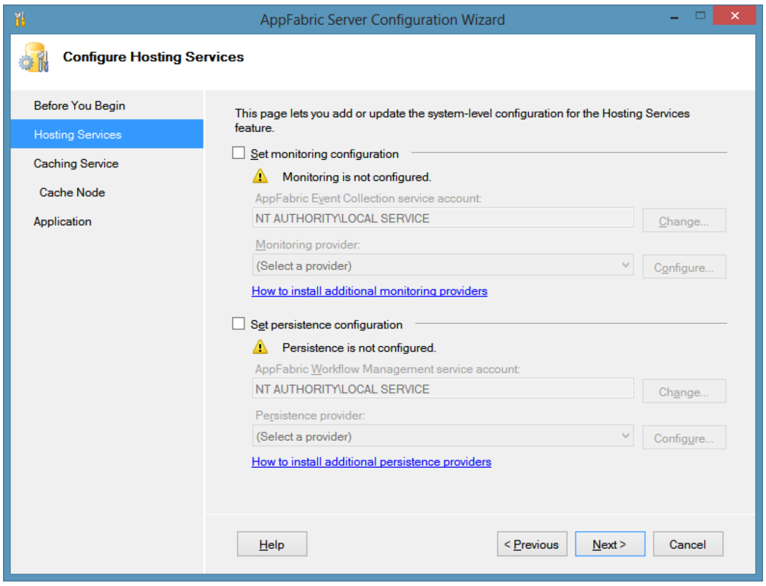
AppFabric Server configuration Wizard opens and the screen **Before you Begin** is displayed.

1. On **Before you Begin** screen click **Next**.




*Screenshot 1006: Configure Hosting Services*

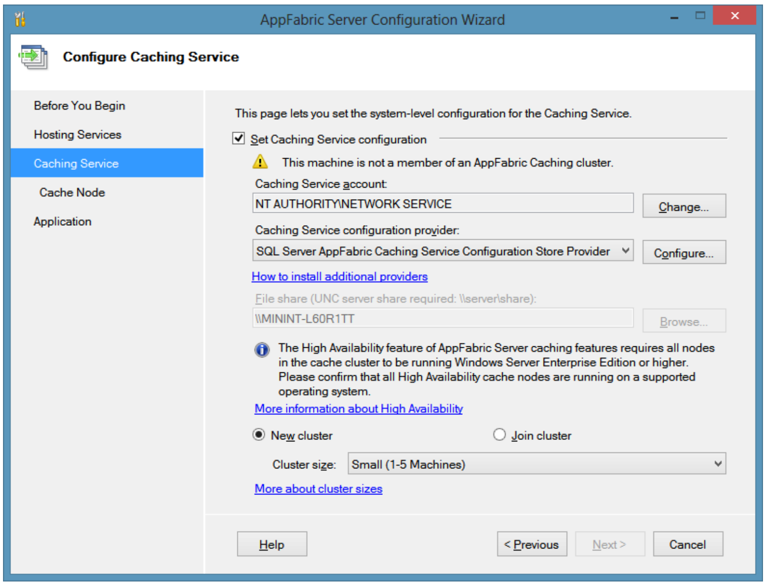
2. **Configure Hosting Services screen** is displayed. Click **Next**.




*Screenshot 1007: Configure Hosting Services screen*

3. **Configure Caching Service** screen is displayed. Check the following values:

- Tick the box next to **Set Caching Service configuration**.
- Click on Change next to the **Caching Service account**.




*Screenshot 1008: Configure Caching Service*

4. **Select User** screen is opened. Click on **Custom account > Browse** and fill in the correct **AppFabric Service** account. Once the account is selected the Password field is enabled. Enter the password for the account and click **OK**

5. Select **SQL Server AppFabric Caching Service Configuration Store Provider**. Then click **Configure**.

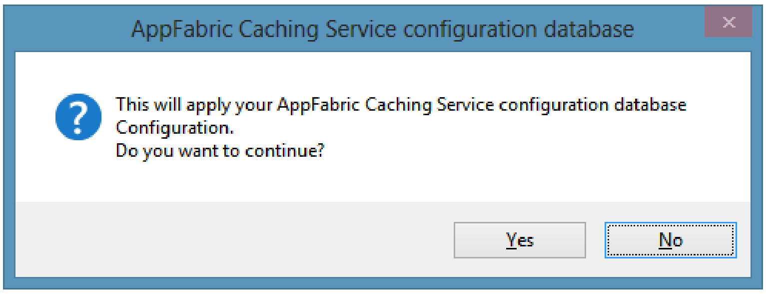
Alternatively, you may use the XML provider. This requires that you have a file share accessible from the AppFabric server where it may store the configuration XML. The AppFabric account must have read/write access to this share.

6. AppFabric Server Caching Service configuration Store is opened. If this is the first AppFabric server to be installed, Click **Create AppFabric Caching Service configuration database**.

Otherwise click Register AppFabric Caching Service configuration database. Then fill in fields with the following Values.

- **Server:** <Microsoft SQL Server Instance>
- **Database:** SitrionAppFabric

7. Click **Ok**. If running the configuration on another server than the first, a message box will appear asking:



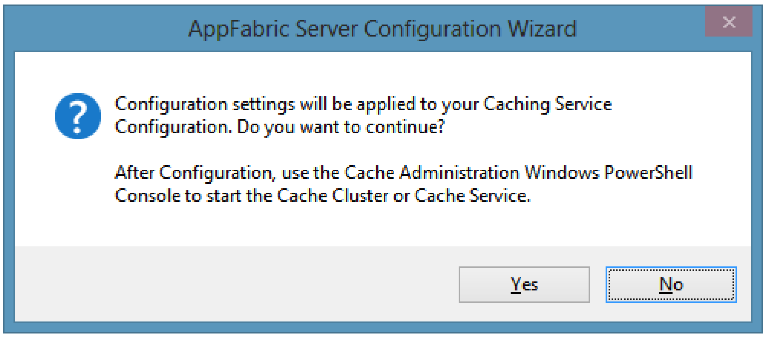

8. Click **Yes**.

9. If running the configuration on the first AppFabric server, select New cluster. Otherwise select Join cluster. For a new cluster size, select the size containing the number of AppFabric servers that will be in the cluster. Typically, this is small.

10. Click **Next**.

11. The screen **Configure AppFabric Cache Node** appears. Ensure options AppFabric Server: AppFabric Caching Service and Remote Service Management are ticked. Click **Next**.

12. A confirmation screen appears. Click **Yes**.




13. Once configured the Configure Application screen is displayed. Uncheck **Start Internet Information Services (IIS) Manager** and click **Finish**.

## Configure services Startup mode

Execute the following steps on every AppFabric server.

1. Open `Services.msc`.

2. Find the **AppFabric Caching Service**, right click, choose **Properties**.

3. Set the startup type to automatic.

4. Click **Start** to start the service.

5. Click **Apply** then **OK**.

6. Repeat these steps on each AppFabric server.

## Configure AppFabric cache host

1. To create the cache host, open a Caching Administration PowerShell window on the First AppFabric Server. Then execute the following commands:

```
New-Cache –CacheNameSitrionSocial

Start-CacheCluster

Get-CacheHost
```

2. `Get-CacheHost` yields a list of cache hosts configured. Please ensure you copy the value of the Column HostName :PortNumber as this data is needed at a later stage.

3. Remove the Default cache as it is no longer used. In the Caching Administration Powershell window, execute the following command:

`Remove-Cache -CacheName default`

4. Set the cache-size to the amount of memory the server has, reserving at least 2Gb minimum for the OS (for example, set a cache size of 14 Gb for a server with 16 Gb of RAM).A cache size of 16 Gb or less is recommended to minimize latency.

```
Stop-CacheCluster

Set-CacheHostConfig –HostNameyourappfabricservernamehere.com -CachePort 22233 -
CacheSize16384

Start-CacheCluster
```

## Grant Application Pools access to the Cache

To grant the Application pools access to the cache, open a Caching Administration PowerShell window on the First AppFabric Server. Then execute the following commands:

1. Grant your Web Application Pool ID(s) for your web applications and the Aurea Social Services application pool access to the cache.

2. Open a Caching Administration PowerShell window, right click to run as administrator.

3. For each account, run:

```
Grant-cacheallowedclientaccount domain\username
```

## Update AppFabric

1. As of the writing of this document, the latest update for AppFabric is CU 7. You may download it here: https://support.microsoft.com/en-us/kb/3092423

2. Run the Cumulative Update on each AppFabric server. In some instances, the update may take 15-20 minutes where it appears that it is doing nothing with a cmd prompt window. Be patient and wait for a screen to pop up indicating that the update has completed.

3. Reboot each AppFabric server.

## Copy and install AppFabric libraries to all SharePoint servers

Delete this text and replace it with your own content.

1) Remote in to the SharePoint Central Admin server:

» This step is to be done in one SharePoint server only and it copies App Fabric libraries to all SharePoint servers and registers them to be used by Aurea Social caching infrastructure.

2) If you are running on a CU of AppFabric other than CU 7 you need to copy the following dll files from the AppFabric install directory (typically `C:\Program Files\AppFabric 1.1` for Windows Server) to the location where you extracted the `AppFabricSitrion.zip`, in a folder call App Fabric Classes, replacing the `.dlls` in that folder.

» `Microsoft.ApplicationServer.Caching.Client.dll`

» `Microsoft.ApplicationServer.Caching.Core.dll`

» `Microsoft.WindowsFabric.Common.dll`

» `Microsoft.WindowsFabric.Data.Common.dll`

3) Manually copy the App Fabric Classes folder to each server Sharepoint server. Then, on each server, run as Administrator a cmd prompt, change directory to where you copied the App Fabric classes folder and use `gacutil.exe` to place each `.dll` in the gacac (there are example in `GACUTILExamples.txt` that are untouched by Word auto formatting):

» `gacutil.exe -i“c:\locationtofolerhere\App Fabric Classes\Microsoft.ApplicationServer.Caching.Client.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.ApplicationServer.Caching.Core.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.WindowsFabric.Common.dll”`

» `gacutil.exe -i “c:\locationtofolerhere\App Fabric Classes\Microsoft.WindowsFabric.Data.Common.dll”`

4) Ensure that on each Sharepoint server the `.dlls` listed in `Sitrion\app` fabric classes are added to the gac (`C:\windows\assembly`) on each SharePoint serverConfigure Sitrion to Use AppFabric cache

## AppFabric configuration in Aurea Social

1. Navigate to **Central Administration->Manage Service Applications**.

2. Click on NewsGator Social Platform Services Proxy.

3. Click on **Manage**.

4. Scroll down until you see **Manage Cache Settings**.

5. Click under the right column on option **Manage Cache Settings**.

6. Fill the cache settings form using the values from the Get-CacheHost cmdlet.

a. Check the checkboxes **SuggestAhead Caching**, **Content Caching** and **Community Caching**.

b. Cache Server address: this is the ip or servername followed by the port. You can obtain this information by running the `Get-CacheHost cmdlet` in the Caching Administration Powershell window.

c. Cache Name:Aurea Social

d. Cache Service Account Type:DomainAccount.

e. Channel Open Timeout: Leave as default 3000 ms.

f. Compression Enabled: No.

g. Diagnostic Tracing Enabled: No.

h. Max Connections to Server: Set this to the number of cores available to your app Fabric server

i. Request Timeout: Leave this as the default 10000 ms.

j. Max Queue Length: Leave this as the default 60000 ms.

k. Poll Interval: Leave this as the default 300 seconds.

l. Local Cache Enabled: No.

m. Security Mode: Transport.

n. Protection Level: Encrypt and Sign.

o. Transport Properties: Leave every property in this section as the default value.

p. Click **Save**.

7. Reboot all SharePoint servers.

## Next steps and verification

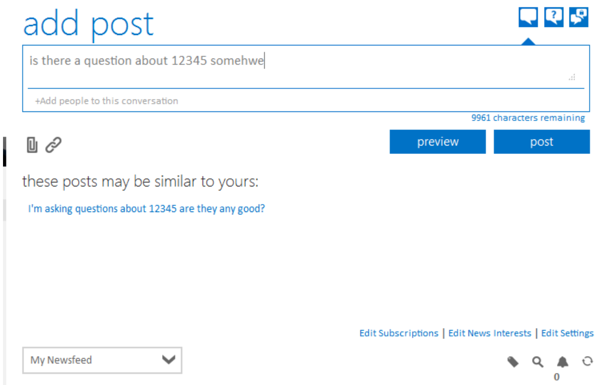
The next time the "NewsGator Suggest Ahead Builder Job" runs, the cache is filled. You can get immediate results by manually running the job. You can also update the job frequency to every 15 minutes if you desire but we do not recommend running it more frequently than that.

To verify that the cache has gathered data from Aurea Social, remote desktop to the AppFabric server, start the **Caching Administration Powershell** as administrator, and type the following command:

```
Get-CacheStatistics -CacheNameSitrionSocial
```

Size and items should not be 0.

To test that Suggest Ahead is functional, start typing a post that contains a similar word to another recent post in the system. As you are typing, you'll see results similar to the following:




*Screenshot 1009: Example for suggest ahead function*

## Troubleshooting

Below are some of the error you may get when trying to install AppFabric on Aurea Social:

### Timeouts

You may get below error in the Event Viewer:

```
AppFabricCache.Get(key, region) Region: NGCommonCache Error: Microsoft.Ap-
plicationServer.Caching.DataCacheException:
ErrorCode<ERRCA0018>:SubStatus<ES0001>:The request timed out
```

You can tweak the timeout settings for the service app to increase to 500 for example.

`SocialSitesCacheConfig.zip` is included in the download.

Then in a command prompt run

```
.\SocialSitesCacheConfig.exe –CacheRequestTimeout 500
```

If you're still experiencing issues, you'll probably need to increase the `maxConnectionsToServer` in the `web.config` of the web application.

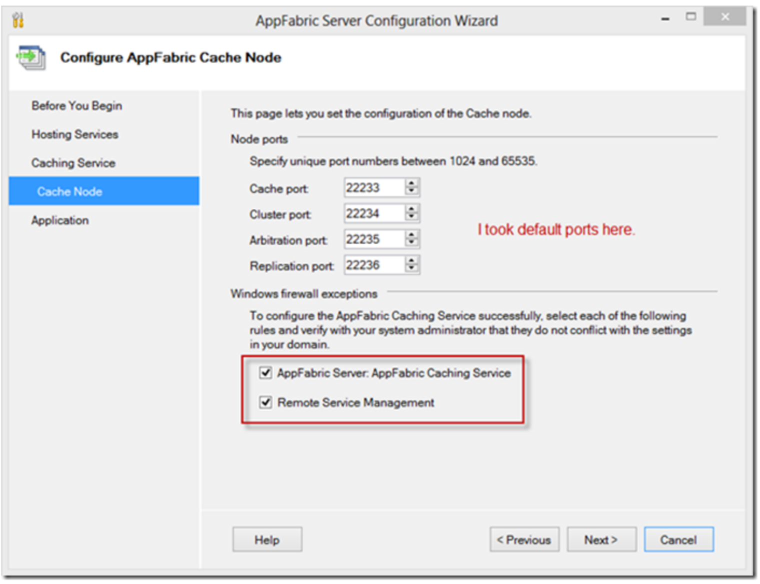
To do this, one must modify the `web.config` to include these elements:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<!--configSections must be the FIRST element -->
<configSections>
<!-- required to read the <dataCacheClient> element -->
<section name="dataCacheClient"
         type="Microsoft.ApplicationServer.Caching.DataCacheClientSection,
Microsoft.ApplicationServer.Caching.Core, Version=1.0.0.0,
            Culture=neutral, PublicKeyToken=31bf3856ad364e35"
allowLocation="true"
allowDefinition="Everywhere"/>
</configSections>

<dataCacheClientrequestTimeout="15000" channelOpenTimeout="3000" maxCon-
nectionsToServer="100">
<localCacheisEnabled="true" sync="TimeoutBased" ttlValue="300" objectCount="10000"/>
<clientNotificationpollInterval="300" maxQueueLength="10000"/>
<hosts>
<host name="CacheServer1" cachePort="22233"/>
<host name="CacheServer2" cachePort="22233"/>
</hosts>
<securityProperties mode="Transport" protectionLevel="EncryptAndSign" />
<transportPropertiesconnectionBufferSize="131072" maxBufferPoolSize="268435456"
maxBufferSize="8388608" maxOutputDelay="2" channelInitializationTimeout="60000"
receiveTimeout="600000"/>
</dataCacheClient>
</configuration>
```

## Firewall

During the install process it is very important that you choose the option to include the Firewall rules for AppFabric (see red box in below screenshot).

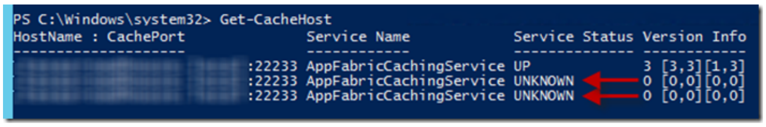



*Screenshot 1010: AppFabric Server Configuration Wizard*

However, even with these in place you still have Firewall problems if Ping is not enabled—your cache nodes cannot communicate.

An easy way to determine this is to run "`Get-CacheHost` and see if any nodes' statuses come back as "Unknown" (as seen in the below screenshot).

This can be an indication of other network problems of course, but it definitely shows this way if you have the problem I am describing.



*Screenshot 1011:*

The ping command uses the ICMP protocol. So, you need to add an inbound rule on all of the servers in your cache cluster to allow incoming ICMP traffic. Once I did this, my three cache nodes could communicate with one another as expected.

## Domain accounts running the caching service

It is well documented that you have to grant access to any client accounts that you want to use to write to AppFabric through the PowerShell `Grant-CacheAllowedClientAccount` command—and these of course can be Domain Accounts.

However, if you chose a Domain account to run the AppFabric caching service when you installed it, rather than a built-in account like NETWORK SERVICE, then you have to add one small attribute to any client application's config file that communicates with AppFabric or that application cannot communicate with AppFabric successfully.

You must include the `dataCacheServiceAccountType` attribute on your `dataCacheClient element`, and set it to a value of DomainAccount as shown in the below example.

```
<dataCacheClientdataCacheServiceAccountType="DomainAccount">
<hosts>
<hostname="127.0.0.1"cachePort="22233"/>
<hostname="127.0.0.1"cachePort="22233"/>
<hostname="127.0.0.1"cachePort="22233"/>
</hosts>
</dataCacheClient>
```

Even if all other configuration, permissions, and firewall rules are in place—your client applications cannot interact with AppFabric cache unless you explicitly tell them that a DomainAccount is running the service with this small configuration attribute.

## Could not load Microsoft.ApplicationServer.Caching.sql provider

### Error

```
Use-CacheCluster :ErrorCode:SubStatus:Provider "System.Data.SqlClient" instantiation
failed: Could not load file or assembly 'Microsoft.Ap-
plicationServer.Caching.SqlProvider, Version=1.0.0.0, Culture=neutral, PublicKeyToken-
n=31bf3856ad364e35' or one of its dependencies. The system cannot find th e file
specified. At line:1 char:62 + Import-Module DistributedCacheAdministration;Use-
CacheCluster<<<< + CategoryInfo : NotSpecified: (:) [Use-CacheCluster], DataCacheEx-
ception + FullyQualifiedErrorId :

 ERRCMS0007,Microsoft.ApplicationServer.Caching.Commands.UseCacheClusterCommand
```

### Resolution

The error is because there is a missing entry for the Required Assemblies section in the configuration file (`C:\Program Files\AppFabric 1.1 for Windows Server\PowershellModules\DistributedCacheAdministration\DistributedCacheAdministration.psd1`) of the `DistributedCacheAdministrationPowershell` module.

Simply added the missing DLL in the configuration file solve the issue:

```
@{ ModuleVersion = '1.0' GUID = 'e0f1ac07-c706-4b65-ac0b-63ac0ab31237' Author =
'Microsoft Corporation' CompanyName = 'Microsoft Corporation' Copyright = '(c)
Microsoft Corporation. All rights reserved.' Description = 'Microsoft AppFabric Cach-
ing Administration module' PowerShellVersion = '2.0'RequiredAssemblies=

"..\..\Microsoft.ApplicationServer.Caching.SqlProvider.dll",
"..\..\Microsoft.ApplicationServer.Caching.Management.dll", "..\..\Mi-
crosoft.ApplicationServer.Caching.Server.dll", "..\..\Mi-
crosoft.ApplicationServer.Caching.Core.dll",
"..\..\Microsoft.WindowsFabric.Common.dll", "..\..\Microsoft.WindowsFabric.Data.dll",
"..\..\Microsoft.WindowsFabric.Data.Common.dll", "..\..\Mi-
crosoft.WindowsFabric.Federation.dll" TypesToProcess = @() FormatsToProcess =
'Microsoft.ApplicationServer.Caching.ManagementPS.format.ps1xml' NestedModules =
'Microsoft.ApplicationServer.Caching.ManagementPS' CmdletsToExport = '*'
```

## 1.69 Aurea Social Process for new SharePoint servers added to the farm

Below is the process:

### 1. Add new servers to the farm following this process outlined by Microsoft.

It involves installing SharePoint and any applicable service packs or cu's, then adding the new server to the farm by running psconfig.

Remember that if you had made any manual changes on the file system, such as editing a `web.config` or feature xml, that those same files must be added to the new servers as well at the same location.

Once the new server is successfully added to the farm following guidance from Microsoft, we can tackle the Sitrion software component.

### 2. Disable then re-enable the NewsGator Installer farm features (only perform this once all new servers are added to the farm).

You can perform this in **Central administration -> System Settings -> Manage Farm Features**, or by running `ToggleNGFarmInstallerFeatures.ps1` as a farm administrator.

Listed below are all farm features to toggle off/on from core and all modules. If you don't see a feature in your farm, you likely don't have the module installed and can skip it.

- NewsGator Enrich Module Installer (farm)
- NewsGator Idea Stream Installer
- NewsGator Innovation Module Installer (farm)
- NewsGator Internal Communications Installer (farm)
- NewsGator News Stream Installer
- NewsGator Spotlight Installer
- NewsGator Video Stream Module Installer

### 3. Start all NewsGator Services on your application tier servers.

This can be accomplished through **Central Administration -> System Settings -> Manage Services on server**, and for each application tier server, start all NewsGator labeled services.

Alternatively, edit `StartNGServices.ps1` to include your application tier servers in the array on line 6 and then update the corresponding NewsGator services that you want to start on line 11.

Save and then run as a farm administrator.

For each server you specified in `StartNGServices.ps1`, it starts NewsGator services there. These services may take some time to start.

Here are all NewsGator Services (if you don't see one or more in the farm, you may not have the associated module installed):

- NewsGator Enrich Service
- NewsGator Innovation Service
- NewsGator Internal Communications Service
- NewsGator News Stream Service
- NewsGator Social Application Services
- NewsGator Social Platform Services v2.
- NewsGator Video Stream Service

### 4. Stop all NewsGator Services on your web front end servers.

Similar to step 3 above, this can be accomplished by navigating to **Central Administration -> System Settings -> Manage Services on server**, and for each web front end server, stop all NewsGator labeled services.

If you want to do this with powershell, edit StopNGServices.ps1 to include your web front end tier servers in the array on line 6 and then update the corresponding NewsGator services that you want to stop on line 12.

Save and then run as a farm administrator.

For each server you specified in StopNGServices.ps1, it will stop NewsGator services there. These services may take some time to stop.

### 5. Verification

You could edit the host file on your machine to verify functionality on each new web front end server.

a. **Central Administration**

i. **System Settings -> Manage Farm Solutions** – for each farm globally deployed NewsGator farm solution, click into and check the Last Operation Details – it should show the server name(s) of the server(s) you just added to the farm. If checking all solutions is too cumbersome, only check `newsgator.core.application.wsp`.

ii. **System Settings -> Manage Farm Features**– for each farm feature toggled in step 2, verify that it is reflected as active on the farm solutions page.

iii. **System Settings -> Manage Services on server**. For each server first verify the tier. If it's an application tier server, verify that all Newsgator services are started. If it's a web front end system, verify that the NewsGator services are stopped on the sytem.

b. **Aurea Social Activity**

- Create a microblog post
- Edit the microblog post
- Like the post
- comment the post
- Post a question
- Answer the question
- Create question with a poll
- Vote on the poll
- Follow a community
- Unfollow a community

- @target a community in a post
- Create a new blog post in a community
- Give someone a kudos badge

## 1.70 Testing procedure and results used to establish capacity guidelines

### Overview

This document describes the testing methodology and results that were used in determining capacity recommendations for those planning to add Aurea Social to their existing SharePoint environment.

The resulting capacity guidelines appear both here and in the Aurea Social Planning and Installation Guide.

Because Aurea Social runs as an application within the SharePoint 2010 or 2013 platforms, its performance characteristics have a direct relationship to the performance characteristics of SharePoint.

Therefore, Aurea Social capacity planning guidelineswere developed to express the amount of extra work the platform needs to do when running Aurea Social, above and beyond the work required to run a baseline SharePoint configuration, as a fraction of that baseline amount of work.

Although this testing was performed against version 1.2 of Social Sites (now known as Aurea Social), this guidance has proven to work well in subsequent versions.

The testing methodology used to develop these guidelines somewhat follows the performance testing methodology contained in a performance case study, Case Study for Capacity Planning for My Sites installation, performed at Microsoft.

That case study compares a set of performance tests run in various SharePoint configurations ranging from a single machine hosting the web front end, application server, with a separate machine hosting the SharePoint databases; to a farm environment configuration with multiple web front ends, application and database servers.

As performance testing for the Aurea Social product has different goals, the methodology mentioned in the case study are not followed exactly. These tests were performed to show how SharePoint with Aurea Social scales in relation to a base SharePoint installation.

### Assumptions

- Authentication performed via NTLM

### Glossary

- WFE: Web Front End server
- AS: Application server
- DB: Database server
- AxBxC (Graph notation): This is the number of WFEs, ASs, and DB servers. For example 2x1x1 stands for 2 WFEs, 1 AS, and 1 DB server.
- RPS : Request per second. The number of request received by the server in one second.
- CPU Load: processor utilization
- TRT: Total Response Time. The sum of the time taken for all request related to a page to respond. This includes the response time for the initial page, and all AJAX requests made by the page for the additional data. The AJAX requests are included because the Activity Stream web part obtains it's working data mainly through AJAX requests. This does NOT reflect the time taken by the browser to render the response data.
- Green Zone:

- CPU Load <= 50% (selected because it seems to be widely recognized value at which servers should stay under during normal operation. If a system runs at more than 50% it is less likely to handle spikes in traffic without affecting the perceived performance of the system)
- TRT < 3 sec (select for customer feedback)
- VSTS Load: Threads used by Visual Studio Team System (VSTS) to simulate virtual users.
- SP Page: The Share Point Page used during testing. A default page create from a standard Share Point page template that contains no Skyvera Social content, in this case the default site welcome page
- AS Page: A blank Share Point page containing a Skyvera Social Activity Feed web part.

## 1.70.1 Testing

**Hardware Configuration:**

| | Web Front End 1 | Web Front End 2 | Application Server | Database Server |
|---|---|---|---|---|
| Server Model | Dell PowerEdge 1850 | Dell PowerEdge 1850 | Dell PowerEdge 1850 | Dell PowerEdge 6800 |
| Processors | 2 Intel Xeon Irwindale 2.8GHz | 2 Intel Xeon Irwindale 3.0GHz | 2 Intel Xeon Irwindale 3.0GHz | (4) Intel Xeon 7140M 3.4GHz |
| RAM | 8GB | 8GB | 10GB | 64GB |
| HardDrive | 73GB 10K SCSI | 73GB 10K SCSI | 73GB 10K SCSI | 73GB 15K SCSI |

**Software Configuration:**

| | Web Front End 1 | Web Front End 2 | Application Server | Database Server |
|---|---|---|---|---|
| Operating System | Windows Server 2008 R2 SP1 | Windows Server 2008 R2 SP1 | Windows Server 2008 R2 SP1 | Windows Server 2008 R2 SP1 |
| Software | SharePoint 2010, Social Sites 2010 v1.2 (aka Skyvera Social) | SharePoint 2010, Social Sites 2010 v1.2 (aka Skyvera Social) | SharePoint 2010, Social Sites 2010 v1.2 (aka Skyvera Social) | SQL Server 2008 R2 |
| UAC | Disabled | | Disabled | Disabled |
| Firewall | Disabled | | Disabled | Disabled |

**Methodology:**

A series of test were performed for both the SP and AS page to determine the maximum VSTS load while maintaining the Green Zone constraints.

We performed tests for the following SharePoint configurations: 1x0x1 (1 WFE and AS, 1 DB), 1x1x1, and 2x1x1. The 1x1x1 and 2x1x1 environments were configured in a SharePoint farm environment with the web components enabled for the WFEs and the application services disabled, while the WFEs have all application services enabled and the web components disabled.

Before performing the simulated "production" load a number of tests were performed to add content to the activity stream. After determining the maximum VSTS load an additional test was performed to gather the results used in this guide.

**Notes:**

The tests were performed without load balancing hardware or software. During test we found that load balancing had the potential to skew the results by shifting more traffic to particular WFEs (stickyness).

Also there is slight hardware variations between the machines used at WFEs. The performance test where tailored to provide equal traffic to all web frontends and a total was taken for the combined throughput of all WFEs.

## 1.70.2 Results and Analysis

**SP Page (SharePoint page)**

| Topology | 1x0x1 | 1x1x1 | 2x1x1 |
|---|---|---|---|
| TRT | ? | ? | .1807 |
| WFE CPU Load | 46.7% | 47.20% | 45.5% (49.4%, 41.6%) |
| AS CPU Load | - | .17% | .68 % |
| VSTS Load | 29 users | 30 users | 50 users |
| Time | 30 mins | 30 mins | 30 mins |

**AS Page (Activity Stream page)**

| Topology | 1x0x1 | 1x1x1 | 2x1x1 |
|---|---|---|---|
| TRT | ? | ? | .3775 sec |
| WFE CPU Load | 46.7% | 47.70% | 49.15% (49.5%, 48.2%) |
| AS CPU load | - | 5.14% | 20.20% |
| VSTS Load | 13 users | 15 users | 35 users |
| Time | 30 mins | 30 mins | 30 mins |

**Notes:**

- Entries marked with - are not applicable for this configuration
- Entries marked with ? are missing. We had a problem with the db and the results aren't available in VSTS anymore. I'll be re-running those test over the next couple days and updating the results. This should not affect the overall conclusion (I expect the test results should be very close to the last 50 times I ran them). The TRT numbers are complete for the most load generated during testing and they have response times well below the Green Zone numbers.

## 1.70.3 Guidance

In conclusion the load increases for the Activity Stream is heavily weighted toward the WFEs.

| | 1x0x1 | 1x1x1 | 2x1x1 |
|---|---|---|---|
| WFE load increase (users) | 16 | 15 | 15 |
| WFE load increase (%) | 123% | 100% | 43% |
| | | | |

For capacity planning, plan as you would for a general SharePoint environment. Any page that contains the Activity Stream web part will need to add about 30% capacity for concurrent user load.

From what we can tell we scale in a similar fashion to a SharePoint environment (which makes sense, running on a SharePoint environment). Performance degradation is most noticeable in the WFEs. Since a farm environment is designed to scale out the WFEs horizontally, this is straightforward issue to address.

The AS has quite an increase in CPU Load as well, but as shown in the charts, the utilization was between 5% to 20%. This wasn't a factor (for these test) in performance.

Memory stats are not included. The server environment seems to have held around 50% to 80% utilization, and didn't seem to play a role in performance. Having said this, more memory never hurts.

Typically when asked something like "can the system handle 200k users", this means 200k users/day. You'll need to calculate the number of users/sec. Not counting spikes in traffic or other types of non-constant load, you can calculate the users/sec metric like so:

Given below is a user metric of nnnK users

- = nnnK users/day
- = nnn,000 / 24 hours / 60 minutes / 60 seconds
- = n / 86400
- = n users/sec

For example:

- 200K users = 200,000 / 86400 = 2.35 user/sec
- 30K users = 30,000 / 86400 = .35 users/sec

You can take these metrics and compare them to the VSTS Load in the tables above.

## 1.71 Aurea Social upgrade process

### Overview

This guide is intended to provide steps needed to upgrade Aurea Social.

### Environment verification

In order to successfully upgrade Aurea Social, it is necessary to first validate the SharePoint environment.

#### Check upgrade status

1. Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Check Upgrade Status**.

2. Confirm the last event for each server has succeeded.

If there is a failure, consult the log file mentioned in the upgrade session details and address the problem.

While addressing the problem, you may need to run `psconfig`.

#### Check product and patch installation status

1. Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Check product and patch installation status**.

2. Confirm that the install status is installed for each product/patch.

3. Address any failures.

#### Check database status

Navigate to SharePoint **Central Administration -> Upgrade and Migration -> Review Database Status**.

Confirm that the status for each database is **no action required**. If the status reflects as other than ‘no action required’, consult Microsoft Support or Microsoft Technet to take the appropriate action to address the issue.

## Pre-upgrade steps

These steps outline the actions necessary to be taken directly before upgrading Aurea Social.

### Copy Aurea Social Files to Server

1. Download the Aurea Social bits (core + modules) from the release portal.

2. Copy them to a SharePoint server in the farm (typically this is the Server hosting SharePoint Central Administration).

3. Ensure that the `.zip` files are not blocked. To do this,

a. Right click each `.zip` file.

b. choose Properties, and then find an Unblock’ button. If you do not find it, the files are not blocked.

c. If the button exists, click it to unblock the file. Then unzip.

For the modules, you need to unzip them, then copy any `.wsp` files to the Solutions folder created when you unzipped the core files.

### Verify Aurea Social Prerequisites

You should verify the prerequisites before attempting an upgrade. To do this,

1. Run `Launcher.exe` (right click, run as Administrator) from the Aurea Social Files on the server, logged in as the account that is performing the upgrade (typically the farm account).

2. Address any deficiencies. Mainly, these have to do with permissions.

3. Once the prerequisite check is complete, click the X in the upper right-hand corner to exit.

### Clear SharePoint Config Cache

Clear the SharePoint config cache on each server in the farm. This ensures that each SharePoint server has the latest copies of all files from the database.

Use the provided `Clear-SPTImerCache.ps1Powershell` script to automate this process. Running it once as an Administrator running the SharePoint Management shell clears and regenerate the config cache on each server in the farm.

This takes several minutes to complete for each server in the farm.

### Reboot Farm

Restart each server in the SharePoint farm, including the SQL server.

A restart minimizes the chance of any `.dlls` being locked and that server resources are re-allocated.

### Backup Farm

The farm should be fully backed up before starting the upgrade. The recommended procedure is to take full SQL backups of all SharePoint, including Aurea Social/NewsGator, databases.

Alternatively, if the farm consists of virtual machines, snapshots are a simple but effective backup mechanism.

### Ensure Timer Service Functionality

Aurea Social relies on the SharePoint Timer Service to successfully deploy solutions.

If the timer service is non-functional on any SharePoint server on the farm, the upgrade could fail.

To verify timer service functionality,

Navigate to **Central Administration>Monitoring>Review Job Definitions>Job History**.

In the upper right-hand corner, you can filter the View.

From the drop-down menu, choose **Server**.

For each server in the farm, verify that timer jobs have been executing successfully on each SharePoint server in the farm. Each server typically executes several of every minute.

### Turn off Antivirus Software

You should turn off antivirus software on the server on which you are running Setup and leave if off for the duration of the upgrade. You can turn it back on once the upgrade is complete.

### Note on Web Applications

The installer forces deploy solutions to each web application selected in the installer in sequence. Before it moves on to web application two, it must complete the deployment to web application one.

This means that the more web applications that need to be deployed to, the longer the upgrade takes. Also keep in mind that very little information is logged to the upgrade console window during these solution deployments (unless there is an error), so even though it may seem like nothing is happening, it's likely that the installer is churning away behind the scenes.

Aurea Social recommends testing the upgrade process in a pre-production farm with the same number of web apps as the production farm to give a rough estimate of how long the production upgrade takes.

If your farm has more than two web applications with Aurea Social installed, upgrade time can be greatly increased by stopping web applications prior to the upgrade.

### Note on Upgrade/Installation Account

If the upgrade / installation account - the account that you are logged into the server and performing the upgrade with – has a large profile, that large profile increases the time needed to perform the upgrade.

Aurea Social recommends deleting any unneeded files from the profile. A profile can get quite large if files, such as service packs, are saved to the desktop instead of a designated downloads folder on the file system or network share.

To check the profile size, do the following:

1. Log on to the server on which you want to perform the upgrade.

2. Right click on 'computer' or 'my computer', then 'advanced system settings.'

3. In the **User Profiles** section click '**settings**' All profiles, along with size, are listed. Locate the profile you are logged in with to perform the upgrade. You'll want to get the profile down to 5-10 MB, if possible.

Typically, you can find the profile on the file system at `C:\users\%USERNAME%` - move or delete unnecessary or large files.

### Disable Search Crawls and User Profile Synch

To prevent the upgrade fighting for resources with Search and UPA Synch, these should be disable prior to running the upgrade.

To disable UPA Sync, do the following:

navigate to **Central Administration>Application Management>Manage Service Applications**.

Click into the **User Profile Service Application >Configure Synchronization timer Job** and click **Disable**.

To disable Search crawls, navigate to Central Administration>Application Management>Manage Service Applications click into the Search Service Application >Pause/Resume and click Pause.

## Aurea Social Upgrade

These steps outline the actions necessary to be taken directly before upgrading Aurea Social.

### Launch the upgrade

1. Go to remote desktop and navigate to the Central Administration server that you copied the Aurea Social files to as part of the pre upgrade steps above.

2. Login with the account that that is used to perform the upgrade (typically the farm account).

3. Right click and **run as administrator** `Launcher.exe`.

4. Click through the on-screen prompts to perform the upgrade.

#### Address warnings and errors

Once the upgrade is complete, examine the log file created by the upgrade. Address any warnings or errors. Some warnings / errors can be successfully ignored after verification of the Post-upgrade steps below.

For example, you may see warning / errors about not being able to restart services. Often this is caused by the services taking longer than normal to restart, but nothing is really wrong or broken. You may need guidance from Aurea Social Support to address these errors.

#### Video Stream Only

If you are using the video stream module, you have to run the additional components installer to upgrade the encoding and streaming servers.

Run `setup.exe` for the additional components installer on the servers which hosts these components.

### Post Upgrade Steps

These steps outline the actions necessary to be taken directly after performing an upgrade of Aurea Social.

#### Enable Antivirus Software

Restart any antivirus software disabled before performing the upgrade of Aurea Social.

#### Stop Backend Services on Web Front Ends

By default, every upgrade starts the Aurea Social back end services on all SharePoint servers in the farm, even the web front ends. These services should only run on application servers.

To ensure that the backend services are running where they need to be, navigate to **Central Administration -> System Settings -> Manage Services** on Server.

Ensure that 'newsGator Social Application Services' and 'NewsGator Social Platform Services v2' are present and running only on your application server. You can use the menu to choose the server, and you can start / stop services as necessary from this page.

#### Verify Successful Solution Deployment

Once the upgrade is complete, it is necessary to validate that the Aurea Social solutions are properly deployed. Navigate to **Central Administration -> System Settings -> Manage Farm Solutions**.

Check that all NewsGator solutions are 'deployed', including SharePoint.ajax. Any NewsGator solutions that have an error in deployment reflects 'error'.

You can click on the solution name to find out more information on the specific error.

#### Enable Search Crawls and User Profile Synch

To enable UPA Sync, do the following:

1. Navigate to **Central Administration>Application Management>Manage Service Applications**.

2. Click into the **User Profile Service Application > Configure Synchronization timer Job** and click Enable.

To enable Search crawls, do the following:

Navigate to **Central Administration > Application Management > Manage Service Applications**.

Click into the **Search Service Application > Pause/Resume** and click **Pause**.

#### Verify Product Functionality

Verify the following Product functionality:

- Create a new post.
- Comment on the new post and an existing post.
- Like the new post, as well as an existing post.
- Mark for follow up the new post as well as an existing post.
- Create a new post with an attachment.
- Create a poll.
- @target a community in a post.
- Share a post.
- Add a new colleague.
- Follow a community.
- Trigger an instant email notification.
- Create a new community. Complete community setup.
- Use the Getting Started web part or the profile setup portion on the Lookout page to upload a new profile picture.
- **Video Stream**: Upload a new video to a video center. Does it encode? Can you view it?
- **Video Stream**: Link to a Youtube video in the Activity Stream. Can you watch it in-line.
- **News Stream**: Add a new rss subscription in **Central Administration -> Application Management -> Manage Service Applications ->NewsGator News Stream Services -> Manage Feeds**.
- **News Stream**: if your organization allows personal subscriptions, add a new subscription from the Activity Stream web part 'edit my subscriptions' link.
- **Spotlight**: Create a new automatic rule in Spotlight Management for one microblog. Create a new badge tied to this rule. Post a microblog. Run the NewsGator Reporting Database Load job followed by the NewsGator Spotlight Processing job from **Central Administration -> Monitoring -> Review Job Definitions**. Are you awarded the badge?
- **Ideas**: Create a new site using the NewsGator Private Idea site template. Create a new idea. Vote on it.
- If you have Aurea Social deployed to multiple web applications, test posting a basic microblog from a NewsGator/Aurea Social web part in each web application.

# 1.72 Environment checklist

## Overview

Validating the SharePoint environment prior to upgrading or installing Social is useful to ensure that the install or upgrade goes smoothly.

### Architecture review

The farm architecture can help inform decisions as to Social upgrade or installs and provide a base for recommendations on improvements.

- Web applications: Go to **Central Administration > Application Management > Manage Web Applications**
  - Is Social deployed to all web applications? The more web applications deployed, the longer the upgrade or install takes.
- Number of App and Web Servers in the farm: Go to **Central Administration > System Settings > Manage Servers** in this Farm.

- The number of servers in the farm can help can inform install/upgrade times – the more servers the more time an upgrade will take.

» Number of users is the User Profile Service: Go to **Central Administration > Application Management > Manage Service Applications** and click into the **User Profile Service Application** – the number of profiles will be on the right side. Many profiles with personal sites can increase upgrade times.

» Server Hardware: RAM and CPU should be within Microsoft guidelines plus –

- App with UPA +25%

| Number of WFEs | 1 | 2 | 3+ |
|---|---|---|---|
| % sizing increase suggested to run Social Sites | 100% | 50% | 30% |

» Review Microsoft boundaries and limits.

### Farm upgrade status

Navigate to SharePoint **Central Administration > Upgrade and Migration > Check Upgrade Status**.

Confirm the last event for each server has succeeded. If there is a failure, consult the log file mentioned in the upgrade session details and address the problem.

Once addressing the problem, you may need to run `psconfig`.

### Product and patch installation status

Navigate to SharePoint **Central Administration > Upgrade and Migration** and Check product and patch installation status.

Confirm that the install status is installed for each product / patch. Address any failures.

### Timer service functionality

Aurea Social relies on the SharePoint Timer Service to successfully deploy solutions.

If the timer service is non-functional on any SharePoint server on the farm, the upgrade could fail.

To verify timer service functionality,

1. Navigate to **Central Administration > Monitoring > Review Job Definitions > Job History**.

2. In the upper right-hand corner, you can filter the View.

3. From the drop-down menu, choose Server. For each server in the farm, verify that timer jobs have been executing successfully on each SharePoint server in the farm.

Each server typically executes several of these jobs every minute.

### Installation account

If the upgrade / installation account - the account that you are logged into the server and performing the upgrade with – has a large profile, which increases the time needed to perform the upgrade.

Aurea Social recommends deleting any unneeded files from the profile. A profile can get quite large if files, such as service packs, are saved to the desktop instead of a designated downloads folder on the file system or network share.

To check the profile size, do the following:

1. Log on to the server that needs upgrade.

2. Right click on **computer** or **my computer** and click **advanced system settings**.

3. In the **User Profiles** section click **settings**. All profiles, along with size, are listed.

4. Locate the profile you are logged in with to perform the upgrade. You'll want to get the profile down to 5-10 MB, if possible.

Typically, you can find the profile on the file system at `C:\users\%USERNAME%` - move or delete unnecessary or large files.

### Verify prerequisites

You should verify the prerequisites before attempting an upgrade. To do this,

1. Log in with the account that will be performing the upgrade (typically the farm account).

2. Run `Launcher.exe` (right click, run as Administrator) from the Aurea Social Files on the server,

3. Address any deficiencies. Typically, these have to do with permissions.

4. Once the prerequisite check is complete, click the X in the upper right-hand corner to exit.

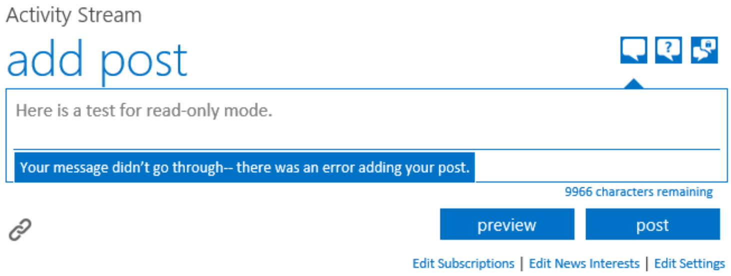
## 1.73 Impact of placing NewsGator / Sharepoint content databases in Read-only mode?

» NewsGator/Sitrion Service Applications: The only impact is that you cannot change permissions or settings. Otherwise service applications are fully accessible in read-only mode.

» NewsGator/Sitrion Timer Jobs: Newsgator timer jobs continue to be scheduled and execute per usual. Any job that attempts to update the database is not successful. This does not have an impact to the end-user, but server administrators sees errors in the windows event logs and ULS related to failing at updating databases in read-only mode.

» Notable NewsGator/Sitrion web parts and pages:

- **Activity Stream:** If a user tries to post, they receive a message that “Your message didn’t go through—there was an error adding your post.” Users can switch stream filters as usual.




*Screenshot 1012: Activity Stream*

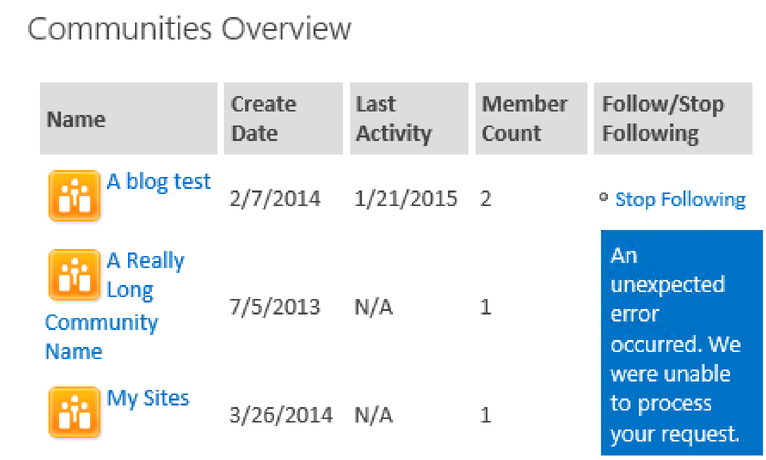
- **Activity Stream Narrow view:** If a user tries to post, they receive a message that “Your message didn’t go through—there was an error adding your post.”Users can switch stream filters as usual.

- **Getting Started:** Although this web part is intended to take a new user through filling out their profile and completing a basic walkthrough of social functionality, any part that saves data to the profile (such as updating skills or interests) is unresponsive. This does not lock up the page or error out, but does not update profile information.

- **My Communities:** This control works as normal.

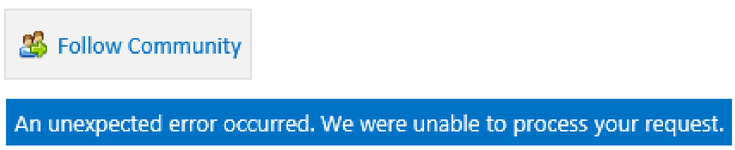
- **Recommended Colleagues:** Only displays the message “An unexpected error occurred. We were unable to process your request.”

- **Communities Overview:** Communities are listed along with create date, last activity, member count, and a follow/stop following control as normal. If a user tries to use the follow or stop following control from this webpart, they see a brief message stating that “An unexpected error occurred. We were unable to process your request.”

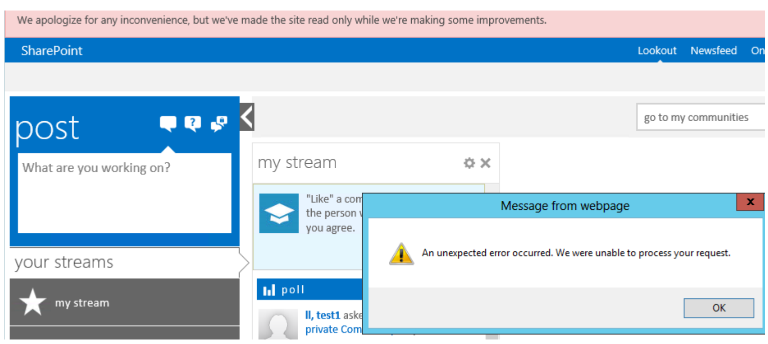



*Screenshot 1013: Communities Overview*

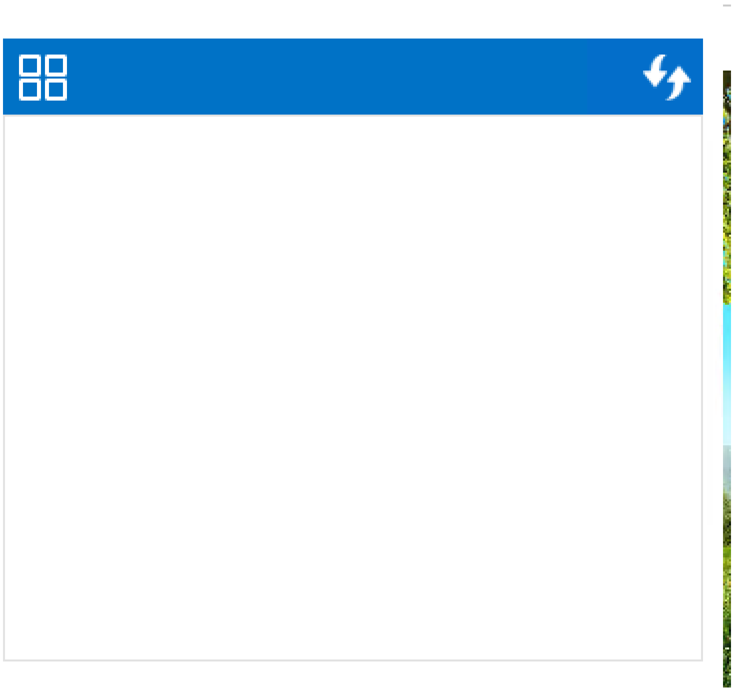
- Earned badges: As this web part only reads data, it displays as normal.
- Spotlight Search: Spotlight search functions as normal – it only reads data.
- Colleagues: Colleagues function normally.
- Who's Following Me: Who's following me functions normally.
- What's new (community activity stream): If a user tries to post, they receive a message that "Your message didn't go through—there was an error adding your post."Users can switch stream filters without errors.
- Community Members: Functions normally.
- Follow Community: When clicked, you see an error message "An unexpected error occurred. We were unable to process your request." Following status isn't changed.




- Lookout page: Upon loading the page, users are presented with a message that states "An unexpected error occurred. We were unable to process your request." Any action that involves adding a new tile or changing a filter on an existing tile precipitates this message. If a user tries to post, they receive a message that "Your message didn't go through—there was an error adding your post."



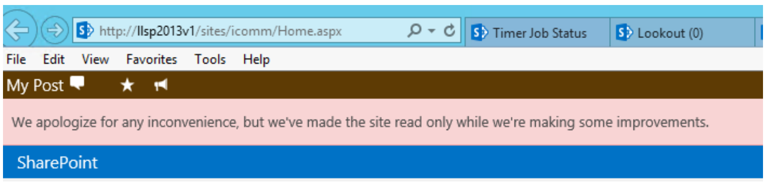

- Lookout 360: Functions normally although you may not post.
- Internal Communications Home Page: Icomm Activity Stream shows no data but a brief outline. Otherwise functions per normal.



- Please note that this is not a comprehensive list of all Aurea Social web parts.

» General takeaways on read only:

SharePoint displays a message to users in read-only sites "We apologize for the inconvenience, but we've made the site read only while we're making some improvements." This is an out of the box SharePoint message. You can read more about how a Sharepoint farm reacts to read-only here.




No pages that Aurea Social tested are inaccessible due to unexpected errors with a correlation ID in our test environment.

The only error messages that users receive is when they try to input data – create a post, upload a document, follow a community, etc. In this instance the user is informed, within the context of the web part that their action didn't complete.

The page is still completely accessible. The only notable exception is the lookout page, where the error message must first be dismissed.

Generally, anything that only reads data works fine. If data is input (or anything that's going to update the database such as follow / unfollow), that's when a user sees an error message.

## 1.74 Overview

This section provide the process for migrating Aurea Social (formerly NewsGatorSocial Sites and Sitrion Social) on SharePoint 2010 to Aurea Social on SharePoint 2013.

Only the required considerations for Aurea Social is documented. Any other SharePoint related migration issues should be directed to Microsoft.

This process is documented on current knowledge and information. Every effort is made to update this document as feedback is provided.

### Audience

**Technical** – SharePoint Engineers, SharePoint Administrators, SharePoint Support, Social SMEs

**Business** – Project Managers, IT Managers

### Assumptions

There are several technical requirements that need to be followed for the migration to be successful:

» Microsoft provides worksheets to manage and document the entire process. See Upgrading to SharePoint 2013.

» SharePoint 2013 in-place upgrades are not possible.

» Only SharePoint 2010 to SharePoint 2013 upgrades are supported for Aurea Social on version 4.5 or higher. SharePoint 2007 (MOSS) instances has to be upgraded to SharePoint 2010 first.

» Your 2010 Aurea Social instance needs to be upgraded to at least the latest 4.5 release before the migration to SharePoint 2013 is started; however, we recommend using the latest release on `https://release01.versata.com/`. As of the latest update to this document, the latest release is 7.1.0.

» The version of Aurea Social must be the same on both SharePoint 2010 and SharePoint 2013 farms. For example, if you are migrating Aurea Social version 5.2.240 on SharePoint 2010, you must migrate to Aurea Social version 5.2.240 on SharePoint 2013.

» Microsoft does not support a FAST Search upgrade. Your search index needs to be rebuilt by a new search service application.

## 1.74.1 Considerations for the migration

You should consider the following information before undertaking the Sharepoint 2010 to 2013 migration process:

» Database schemas and Site Collection upgrades is a separate process. Site Collection owners can preview changes prior to committing changes.

» The SharePoint upgrade keeps a SharePoint 2010 'native' format by providing a 14 and 15 hive on web servers.

» Aurea recommends that Classic mode authentication (NTLM) web applications be converted to claims based authentication before the migration, though Microsoft provides a process on SharePoint 2013 to accomplish this.

» Aurea Social for SharePoint 2013 requires SSL to communicate with the SharePoint object model. This means that even if users don't access your migrated sites over SSL, you need to have created and installed an SSL certificate for your web applications on your new 2013 farm, along with appropriate alternate access mappings.

» You have to set your SharePoint 2010 content databases to read-only during the migration process to SharePoint 2013.

## 1.74.2 Pre-migration steps

Perform the below steps before migrating to 2013:

1. Locate and record existing DNS entries for the web applications to be migrated.

2. Record any settings that will need to be changed on Load Balancers to reflect the new servers and IP addresses.

3. Record Alternate Access Mappings (AAM) configuration on the 2010 farm. This information is in **Central Administration > Application Management > Configure Alternate Access Mappings**.

4. Export any existing SSL certificates from the 2010 farm through IIS Manager, if applicable.

5. Document installation steps for any custom authentication providers (such as FBA or ADFS; NTLM or Claims with NTLM need not worry).

6. Record third party customizations and installation instructions. These have to be installed on the new 2013 farm.

7. Document existing Quota templates.

8. Record Self-service management settings. This applies to the My Site Web App.

9. Document Incoming and Outgoing email settings in **Central Administration > System Settings**.

10. Document SharePoint connectors on Exchange Server.

11. Change any Classic mode authentication (NTLM) web applications to claims based authentication The process to do this is outlined on Technet, and recommend that the process be completed before moving content databases. You also need to update the Super Reader and Super User accounts for all your web applications to the claim accounts.

The following is a Powershell implementation of updating the reader/user accounts:

```
$wa=Get-SPWebApplication http://www.contoso.com
$wa.Properties["portalsuperreaderaccount"]="i:0#.w|domain\cachereader"
$wa.Properties["portalsuperuseraccount"]="i:0#.w|domain\cacheuser"
$wa.Update()
```

**IIS Reset**

12. Document where you have created the Aurea Social email handler. This is also known as the `EmailListWebUrl`. If you are not sure, look at the Url that you provided in the service application in **Central Administraion > Manage Service Applications > NewsGator Social Platform > Email and Notifications > Configure Email Settings**.

13. The SharePoint 2013 farm administrator account must be the same as the account used in SharePoint 2010. Do not overlook this step. The account must be the same in order to export and import the encryption key for the User Profile Service Application. This is explained in detail further in the document.

14. Record any Managed accounts in **SharePoint Central Administration > Security > Configure Managed Accounts**.

15. Record any farm administrators in **SharePoint Central Administration > Security > Manage the farm administrators** group.

16. Export the Microsoft Identity Integration Server Key (MIIS) encryption key. Remote desktop to the 2010 farm central administration server, as a user with local admin right and farm administrator permissions. Run a command prompt as an administrator, and change directory to `<root directory drive>\Program Files\Microsoft Office Servers\15.0\Synchronization Service\Bin`. Then run `miiskmu.exe` to export the key. Copy the key to the new 2013 farm.

17. Record the farm id for the 2010 farm using the SharePoint 2010 Management shell as a farm administrator:

```
Type "$farm = Get-SPFarm", hit enter.
Type "$farm.id", hit enter.
Record the GUID that is returned.
```

18. Record SQL Information for existing web apps and service applications:

| Database name | Database type | Owner(s) |
|---|---|---|
| Managed Metadata Service | Service App | |
| ProfileDB (UPSA DB 1) | Service App | |
| SocialDB (UPSA DB 2) | Service App | |
| SyncDB (UPSA DB 3) | Service App | |
| Business Data Connectivity | Service App | |
| NewsGator_SocialServices | Service App | |

| Database name | Database type | Owner(s) |
|---|---|---|
| NewsGator_Reporting | Service App | |
| NewsGator_Videos | Service App | |
| NewsGator_NewsManager | Service App | |
| Search1 | Service App | |
| Search2 | Service App | |
| Search3 | Service App | |
| WSS_Content1 | Content DB | |
| WSS_Content2 | Content DB | |

19. Record the service application databases and service accounts (application pool identities below).

| Service application name | Associated databases | Application Pool/ID | Additional Properties |
|---|---|---|---|
| Managed Meta Data | | | Content Type Hub:<br>Report syndication errors:<br>Add this service application to default list: |
| User Profile Service Application | | | Profile Synchronization Instance:<br>My Site Host URL:<br>My Site Managed Path:<br>Site Naming Format:<br>Default Proxy group: |
| Search Service Application | | | Search Service Account:<br>Application Pool for Search Admin:<br>Application Pool for Search Query: |
| Business Data Connectivity | | | |
| NewsGator Social Platform Services | | | Email Enabled Web Url: |
| NewsGator News Stream Services | | | |
| NewsGator Video Stream Service | | | Folder for videos waiting to be encoded:<br>Folder for videos that were encoded:<br>Streaming server folder to store videos:<br>Upload folder:<br>Address for Access Default:<br>Address for Access Intranet:<br>Address for Access Internet:<br>Address for Access Custom:<br>Address for Access Extranet: |
| NewsGator Enrich Service | | | KB Global Community URL: |
| NewsGator Innovation Service | | | |
| NewsGator Internal Communications Service | | | |

## 1.74.3 2013 Migration steps

Below are the 2013 migration steps:

### 1. Create the SharePoint 2013 farm for the database attach upgrade

Please follow the documentation on Technet to create the new SharePoint 2013 farm. Most of the prerequisite information must already have been recorded previously in this document.

> **Important:**
> DO NOT create/configure the service applications as directed under the heading 'Configure Service Applications,' as you create / configure these service applications later in this document.

At a high level, this includes:

1. Create new server instances on an operating system supported by SharePoint 2013. Typically, this is Windows Server 2012 R2. SharePoint 2013 hardware and software requirements are outlined here. SharePoint 2013 also requires a SQL instance on which to store database, usually SQL 2008 R2 or SQL 2014.

2. It is assumed that you are using the same service and admin accounts in the SharePoint 2013 environment that were used for the same functions in the SharePoint 2010 environments. Permissions for these accounts (in Windows, SQL, and SharePoint) should be the same, otherwise you run into permissions errors.

3. For each server in the farm, install SharePoint 2013, Service Pack 1, and the latest SharePoint 2013 Cumulative Update.

4. For each server in the farm install any SharePoint Language packs.

5. If Office Web Apps is to be used, install at this time.

6. Run the SharePoint Configuration Wizard on each server in the farm. You start with the server that is to host SharePoint Central Administration, where you can choose to create a new farm. On each subsequent server you have to run the SharePoint configuration Wizard and attach the server to the new farm.

7. Configure farm settings. These include:

- Incoming and outgoing e-mail setting.
- All Farm-level security permissions settings, such as users in the Farm Administrators group.
- Blocked file settings.
- Diagnostic logging
- Settings and schedules for timer jobs.

## 2. Create digital certificate

Aurea Social for SharePoint 2013 requires SSL to communicate with the SharePoint object model.

Generate a digital certificate for the web application(s) that hosts Aurea Social features.

Create an Alternate Access Mapping (AAM) for each of these web applications.

The AAM does not have to be used. It is only required to communicate with the backend.

For further details, see how to create a domain server certificate in IIS 7.

## 3. SQL databases for testing

Take a backup of all your SharePoint 2010 content databases recorded in the pre migration steps above.

Create a 'Databases' folder on your new SQL server and copy each of the `.bak` files to this folder.

Restore the databases to SQL Server that hosts the SharePoint and Aurea Social databases.

## 4. Create web applications

Create the required web applications with new databases that were recorded in step 20 of the prerequisites.

The default web application databases is deleted in the steps below as you import the content databases from SharePoint 2010.

a. Create web applications in SharePoint 2013 to match the web applications in SharePoint 2010. If your SharePoint 2010 web applications uses classic authentication (NTLM), the web application has to be created using Powershell. NTLM based web applications were deprecated in SharePoint 2013 and are considered 'obsolete'.

```
New-SPWebApplication -Name "<Name>" -ApplicationPool"<ApplicationPool>" -Authentic-
ationMethod"<WindowsAuthType>" -ApplicationPoolAccount"<ApplicationPoolAccount>" -
Port <Port> -URL "<URL>"
```

b. Repeat the process for each required web application.

c. Attach the content databases from SharePoint 2010 AFTER you have installed the Aurea Social 2013 solutions, described in the next section.

d. Setup / Bind SSL certificates as required in IIS Manager on each web front end.

e. If you are using authentication other than claims with NTLM, perform additional configuration steps as needed.

### 5. Install third party customizations (Non Sitrion\NewsGator)

Install and deploy any third-party software or customizations (such as branding) that was present in the 2010 farm.

This includes installing and deploying custom solutions. If the third-party customizations require service applications, you may create them as needed; but, remember these will later be deleted and re-created with the migrated databases.

### 6. Install Aurea Social and modules

a. The steps in this section need to be completed before attaching the content databases to the web applications.

b. Download the Aurea Social installer from the release portal along with your licensed module(s). These should match the version of Aurea Social installed in your 2010 farm.

c. Consolidate all the solution files (.wsp) in the Solutions folder of the installer.

> **Important:**
> Make sure that you have copied all the solution files (.wsp) that where installed on your 2010 installation or your SharePoint content database does not upgrade correctly. If you have installed any of the NewsGator modules you must put their solution files in this folder now.

d. Launch `launcher.exe` and

e. Go to **Advanced Options > Install** or **Upgrade Sitrion Social** with **Advanced Options** and check the box next to **Skip Pre-requisite Check**

f. Click **Install** or **Upgrade**. DO NOT choose to provision service applications. Service applications is created later.

### 7. Test content databases

Now that the Aurea Social solutions have been deployed, the SharePoint content databases need to be tested for compatibility with the new farm.

Use the following powershell to test each content database:

```
Test-SPContentDatabase -name WSS_Content_DB -webapplication http://sitename
```

Address any errors before proceeding. Some errors may need to be addressed in your SharePoint 2010 farm, then new backups of your content databases moved over, then run through more rounds of testing with test-spcontentdbase command.

**Helpful links for troubleshooting:**

```
http://get-spscripts.com/2011/08/diagnose-missingwebpart-and.html
http://social.technet.microsoft.com/wiki/contents/articles/11282.sharepoint-2010-
resolving-test-spcontentdatabase-errors.aspx
https://blogs.msdn.microsoft.com/subbu/2012/05/19/fixing-test-spcontentdatabase-warn-
ings/
http://get-spscripts.com/2011/06/removing-features-from-content-database.html
```

Once you have addressed the errors, you are ready to fully migrate the SharePoint 2010 environment to the SharePoint 2013 environment.

For Production environments, this is typically the last step that can be performed before an outage window is required for further work.

### 8. Migrate SQL databases

Put your SharePoint 2010 environment in Read-Only mode. Take a backup of all your SharePoint 2010 content and service applications databases recorded in the pre migration steps above. Copy each of these .bak files to the SQL environment for your new SharePoint 2013 farm.

Restore the databases to SQL Server that hosts the SharePoint and Aurea Social databases. You may choose to not backup and restore the Search Service Application databases and just rebuild the indexes on SharePoint 2013.

If you are changing from one URL to another, please consult our URL migration documentation described in another document.

### 9. Provision SharePoint (Non-Aurea Social/Sitrion/NewsGator) service applications

Provision the service applications in SharePoint 2013. Ensure that you use the correct service application databases that you restored earlier. Certain service applications requires an iis reset to be performed before the management pages can be accessed. After provisioning the service applications, ensure that you have started the corresponding services on your load balanced application servers.

As you provision the SharePoint service application, reference the Upgrade service applications to SharePoint 2013 article on TechNet for a complete set of instructions.

» Provision the Managed Metadata Service application in your SharePoint 2013 farm using the database from your SharePoint 2010 environment. Ensure you provide the correct application pool identity.

» Provision the Search Service application in your SharePoint 2013 farm using the databases from your SharePoint 2010 environment. Ensure you provide the correct application pool identity

» Provision the User Profile Service Application in your SharePoint 2013 farm using the Profile DB, Sync DB, and Social DB from your SharePoint 2010 environment. Ensure you provide the correct application pool identities. The content databases have not yet been attached to new web applications so do not yet provide the My Site Url. The User Profile Service Application requires that you perform an `iisreset` after it is provisioned. You also need to import the encryption key after you have started the User Profile Synchronization service on your servers. This is covered in the Upgrade service applications to SharePoint 2013 article on TechNet.

» Provision the Business Data Connectivity Service application in your SharePoint 2013 farm using the database from your SharePoint 2010 environment. Ensure you provide the correct application pool identity.

### 10. Attach content databases

The SharePoint content databases need to be attached to the web applications that were created in the previous steps.

a. Delete the content databases that were created by the web application provisioning process. You may do this through **SharePoint Central Administration > Application management > Manage Content Databases**. Click on the appropriate database, then check the box next to Remove content database. Click **OK**

b. Configure email settings on the web applications

c. Open a SharePoint Management Shell window (right click, run as administrator). Type the following command and then press Enter:

```
Mount-SPContentDatabase -Name “DatabaseName” -DatabaseServer‟ServerName” -WebAp-
plication‟URL”
```

d. Check the log file for any errors or exceptions.

e. Create the managed paths as they were defined in SharePoint 2010

f. Enable self-service site creation, where applicable, specifically in the My Sites web application.

g. Recreate the web application policies.

h. Recreate quota templates.

i. Create AAMs for each of your web applications.

j. Apply the digital certificate(s) in IIS.

### 11. DNS

Update your DNS records to point to the new SharePoint 2013 instance.

### 12. Update farm ID

Aurea Social keeps a record of the farm id but when the content database is attached to the SharePoint 2013 farm, it must be updated.

Open a SharePoint Management Shell window on the 2013 farm (right click, run as admistrator), and then type out the following:

```
Type "$farm = Get-SPFarm", hit enter.
Type "$farm.id", hit enter.
```

Copy the GUID that is returned.

Run the following SQL update on the SharePoint 2013 farm against the NewsGator_SocialServices database.

```
/*
Replace all instances of 7a137652-19d3-41fb-a78d-6dfbae27f473 (SP2010 source farm)
with the farm id from the SharePoint 2010 farm.
Replace all instances of 0902b3a8-2c57-4ebb-a94c-58a16bbd0f01 (SP2013 target farm)
with the farm id from the new SharePoint 2013 farm that you just recorded.
Replace all instances of http://Sharepoint2010URL/ with the current SP2010 url
Replace all instances of http://MySiteURL/ with the current SP2010 My Site url
*/

Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'


Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'


Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like 'http://Share-
point2010URL%'


/* SPHERES */
```

```
Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE Url like 'http://MySiteURL/%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE Url like 'http://MySiteURL/%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE Url like 'http://MySiteURL/%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE Url like 'http://MySiteURL/%'


Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'


       Use NewsGator_SocialServices
Update [dbo].[SocialGroup] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[ActivityEvent] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[ActivityEventMeta] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'
Update [dbo].[FollowedDocument] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
       WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473' AND Url like
'http://MySiteURL/%'

/* Repeat these for each additional web application */

Update [dbo].[FarmConfiguration] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473'
Update [dbo].[FarmListQueue] set FarmId = '0902B3A8-2C57-4EBB-A94C-58A16BBD0F01'
WHERE FarmId = '7A137652-19D3-41FB-A78D-6DFBAE27F473'
```

## 13. Verify migration

Verify the following Product functionality:

- Create a new post.
- Comment on the new post and an existing post.
- Like the new post, as well as an existing post.
- Mark for follow up the new post as well as an existing post.

- Create a new post with an attachment.
- Create a poll.
- @target a community in a post.
- Share a post.
- Add a new colleague.
- Follow a community.
- Trigger an instant email notification.
- Create a new community. Complete community setup.
- Use the Getting Started web part or the profile setup portion on the Lookout page to upload a new profile picture.
- **Video Stream:** Upload a new video to a video center. Does it encode? Can you view it?
- **Video Stream:** Link to a Youtube video in the Activity Stream. Can you watch it in-line?
- **News Stream:** Add a new rss subscription in **Central Administration > Application Management > Manage Service Applications > NewsGator News Stream Services > Manage Feeds**.
- **News Stream:** if your organization allows personal subscriptions, add a new subscription from the **Activity Stream** web part **edit my subscriptions** link.
- **Spotlight:** Create a new automatic rule in Spotlight Management for one microblog. Create a new badge tied to this rule. Post a microblog. Run the NewsGator Reporting Database Load job followed by the NewsGator Spotlight Processing job from **Central Administration > Monitoring > Review Job Definitions**. Are you awarded the badge?
- **Ideas:** Create a new site using the NewsGator Private Idea site template. Create a new idea. Vote on it.
- If you have Aurea Social deployed to multiple web applications, test posting a basic microblog from a NewsGator / Aurea Social web part in each web application.

## 1.75 Overview of SharePoint 2016 with Aurea Social Migration

### Prerequisites

- SharePoint 2013 with Service Pack 1. Direct migrations from SharePoint 2010 are not supported, the migration must stop off, however briefly, at SharePoint 2013.
- Aurea Social v5.3 or higher is installed.
- The version of Aurea Social must be the same in both SharePoint 2013 and SharePoint 2016 (for example, v5.3.89 installed to both SP2013 and SP2016).
- Consult Microsoft's best practices for the migration to 2016.

### SharePoint 2016 and Aurea Social Feature Support

All of the product features applicable to SharePoint 2013 are supported for SharePoint 2016. A suite navigation provider has been added to use the same SP2013 suite links configuration.

> **Note:**
> Microsoft has deprecated the "tags and notes" feature in SP2016. Based on testing, we haven't seen any issues with Aurea Social features which rely on the "tags and notes" infrastructure, but we don't recommend that you use these features in SP2016 based on Microsoft's direction.

## SharePoint 2016 Min Role and Aurea Social

SharePoint 2016 has some changes to the roles servers perform. If a farm level service is enabled (i.e. "NewsGator Social Platform Services (Proxy Components, required on all farms)"), then each of the supporting server-level services are required to run on each of servers in the compatible role.

This means that when Aurea Social is installed, the services are required to run on all "Application" or "SingleServerFarm" servers in order to be compliant with the MinRole. The "NewsGator Social Platform Service" is not going to run on "WebFrontEnd", "DistributedCache", or "Search" servers.

When a required service is disabled, there is a link to **Fix** or **Start** the service. You no longer have the option to "stop" services that are required.

Aurea Social recommends using at least SharePoint 2016 feature pack 2 as it contains needed updates to MinRole.

## SharePoint 2016 and Microsoft Identity Manager

SharePoint 2016 no longer relies on Forefront Identity Manager to sync user profile information. Instead, it uses the stand alone Microsoft Identity Manager. Although this does not impact Aurea Social functionality, it is important to note the change.

- For more information, see installing Microsoft Identity Manager (MIM).
- For more information, see deploying MIM for SharePoint 2016 User Profile sync.

## Migration process overview

This migration process nearly mirrors that of SharePoint 2010 to SharePoint 2013.

1. Create the new SharePoint 2016 farm, matching the configuration of the SharePoint 2013 farm where appropriate.

2. Create web applications. The web application content databases will be replaced later with the databases migrated from SharePoint 2013.

3. Create Sharepoint service applications. The service application databases will be replaced later with the databases migrated from SharePoint 2013.

4. Install third-party customizations, solutions, or features.

5. Install Aurea Social v5.3 or higher, matching the version of Aurea Social installed to SharePoint 2013.

6. Copy the databases to the new SharePoint 2016 SQL instance.

7. Upgrade the Sharepoint service applications to SharePoint 2016.

8. Upgrade Forefront Identity Manager (FIM) to Microsoft Identity Manager(MIM) with Service Pack 1.

9. Migrate the Aurea Social service application databases to SharePoint 2016, using the database attach method. The following reference scripts from the 2010 > 2013 migration that are still valid.

- Update farm id using the UpdateFarmID.sql script. You must plug in 2013 and 2016 farm ids.
- Update user profile if urls have changed using UpdateUserProfileUrls.sql.
- Update all other urls if they have changed, using execUpdateUrls.sql (more detail can be found in our environment cloning documentation).

10. Upgrade web application content database(s) to SharePoint 2016.

11. Verify that the content database(s) upgraded successfully.

12. Upgrade site collections and My Sites.

13. Verify and troubleshoot the migration.

# 1.76 UPA migrator

The UPA Migrator tool is used to correct mismatched RecordID's between the Social application and SharePoint. A test run should be performed at least once prior to a run against in-use production data.

## 1.76.1 UPA migrator test run

These instructions take you through testing the UPA migrator test process to correct for miss-matched user RecordId's between SharePoint and Aurea Social.

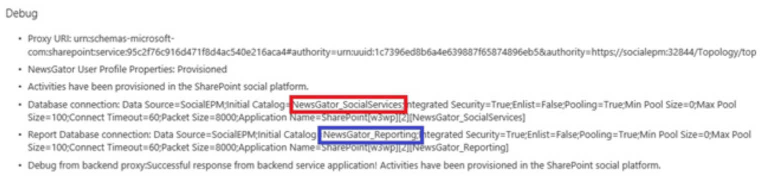
> **Note:**
> These steps should be performed on a backup of the NewsGator Social and Reporting databases, as well as a backup of the SharePoint User Profile database.

To perform a test run of the UPA migrator against all users, follow the below steps:

1. Perform a SQL backup of the NewsGator Social Platform database and reporting database.

The names of these databases can be found in SharePoint **Central Administration > Application Management > Manage Service Applications**. Click into the NewsGator Social Platform Services.

At the bottom of the page, examine the connection string to find the database names.




*Screenshot 1014: The NewsGator Social DB is outlined in red, and the reporting in indigo*

2. Perform a SQL backup of the SharePoint Profile database.

The name of the SharePoint Profile DB can be found in SharePoint **Central Administration > Application Management > Manage Service Applications**.

Click next to the User Profile Service application to bring up the ribbon controls, then click Properties in the ribbon.


*Screenshot 1015: The name of the Profile Database is outlined in red*

3. Restore the backups of the 3 databases you took a backup of in steps 1 and 2 above.

Restore them to new databases with new names (for example, you could use `_TEST` appended to the restored DB's names).

DO NOT overwrite your in-use DB's with these backups. Record the names of the new DB's with the restored data.

4. Prepare and execute the UPA Migrator scripts.

a. Copy `SQL_UPAMigratorall.zip` to your SQL server or desktop. Right-click, choose properties, and click unblock, if applicable. Extract the .zip.

b. Navigate to the folder to which you unzipped `SQL_UPAMigratorall.zip`. Open the `SQL_UpaMigator_Procs` folder. Connect to the SQL instance using SQL Server Management Studio.

i. Open in SQL Server Management Studio `SQL_UpaMigrator_Services_Procs.sql`. Execute it against the copy of the NewsGator Social DB you restored in step 3 above.

ii. Open in SQL Server Management Studio `SQL_UpaMigrator_Reporting_Procs.sql`. Execute it against the NewsGator_Reporting database you restored in step 3 above.

c. Navigate up one level to the folder which you unzipped `SQLUPAMigratorAll.zip`. Open in SQL Server Management Studio UPA_Indexes.sql. Edit the USE statement on line one so that it has the correct name for your restored `NewsGator_SocialServices` database. Edit the USE statement on line 42 so that it has the correct name for your restored NewsGator_Reporting database. Execute the query.

d. avigate to the `SQL_UPAMigrator` folder. Open in SQL Server Management Studio `SQL_UpaMigratorALL.sql`.

i. Edit `SQL_UpaMigratorAll.sql` and update `@SPUSerProfileDB` with the name of the SharePoint Profile DB you restored in step 3 above.

ii. Edit `SQL_UpaMigratorAll.sql` and update `@NGServicesDB` with the name of the `NewsGator_SocialServices` database you restored in step 3 above.

iii. Edit `SQL_UpaMigratorAll.sql` and update `@NGReportingDB` with the name of the `NewsGator_Reporting` database. you restored in step 3 above.

iv. Execute the Query. Please be patient, this query takes a while to run. As a benchmark, it can run through around 6500 users in 30 minutes.

v. Once the query is complete, record the time it took to execute. This provides a benchmark for how long it takes to run against the in-use databases.

vi. Record any errors and share them with your Skyvera contact.

e. Navigate one level up to the folder which you unzipped `SQL_UPAMigratorAll.zip`. Open in SQL Server Management Studio `UPA_DROP_Indexes.sql`.

Edit the USE statement on line one so that it has the correct name for your restored NewsGator_SocialServices database. Execute the query.

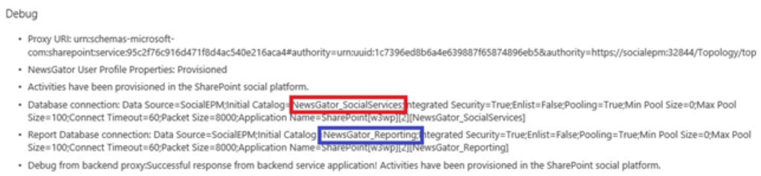
## 1.76.2 UPA Migrator production run

These instructions take you through the UPA migrator process to correct for miss-matched user RecordId's between SharePoint and Aurea Social.

> **Note:**
> The test process outlined in the section above should have been executed first to ensure timing and accuracy of the UPA Migrator fix.

To perform a production run of the UPA migrator against all users:

1. Perform a SQL backup of the NewsGator Social Platform database and reporting database. The names of these databases can be found in SharePoint **Central Administration> Application Management > Manage Service Applications**. Click into the NewsGator Social Platform Services. At the bottom of the page, examine the connection string to find the database names.




*Screenshot 1016: The NewsGator Social DB is outlined in red, and the reporting in indigo*

2. Perform a SQL backup of the SharePoint Profile database. The name of the SharePoint Profile DB can be found in SharePoint **Central Administration > Application Management > Manage Service Applications**. Click next to the User Profile Service application to bring up the ribbon controls, then click **Properties** in the ribbon.


*Screenshot 1017: The name of the Profile Database is outlined in red.*

3. Prepare the UPA Migrator scripts:

a. Copy `SQL_UPAMigratorall.zip` to your SQL server or desktop. Right-click, choose properties, and click unblock, if applicable. Extract the .zip.

b. Navigate to the folder to which you unzipped `SQL_UPAMigratorall.zip`. Open the `SQL_UpaMigator_Procs` folder. Connect to the SQL instance using SQL Server Management Studio.

i. Open in SQL Server Management Studio `SQL_UpaMigrator_Services_Procs.sql`. Execute it against the copy of the NewsGator Social DB you restored in step 3 above.

ii. Open in SQL Server Management Studio `SQL_UpaMigrator_Reporting_Procs.sql`. Execute it against the NewsGator_Reporting database you restored in step 3 above.

c. Navigate up one level to the folder which you unzipped `SQLUPAMigratorAll.zip`. Open in SQL Server Management Studio `UPA_Indexes.sql`. Edit the USE statement on line one so that it has the correct name for your restored NewsGator_SocialServices database. Edit the USE statement on line 42 so that it has the correct name for your restored NewsGator_Reporting database. Execute the query.

d. d. Navigate to the SQL_UPAMigrator folder. Open in SQL Server Management Studio `SQL_UpaMigratorALL.sql`.

i. Edit `SQL_UpaMigratorAll.sql` and update @SPUSerProfileDB with the name of the SharePoint Profile DB you recorded in step 2 above.

ii. Edit `SQL_UpaMigratorAll.sql` and update @NGServicesDB with the name of the `NewsGator_SocialServices` database you recorded in step 1 above.

iii. Edit `SQL_UpaMigratorAll.sql` and update @NGReportingDB with the name of the `NewsGator_Reporting` database you recorded in step 1 above.

iv. Save changes to `SQL_UpaMigratorALL.sql`.

4. Prepare the NewsGator Social platform Services for data correction:

In a web browser, navigate to SharePoint **Central Administration > Application Management > Manage Service Applications**. Click next to (but not on) the NewsGator Social Platform Services, which will provide access to the ribbon controls.

i. Click on Administrators in the ribbon. Record all administrator users and their exact permissions.

ii. Click on Permissions in the ribbon. Record all users and their exact permissions.

5. Delete the NewsGator Social Platform Services service application. This will prevent data access while the UPA migrator performs ID correction.

To delete the NewsGator Social Platform Services,

i. Navigate to SharePoint **Central Administration > Application Management > Manage Service Applications**.

ii. Click next to (but not on) the NewsGator Social Platform Services, which provides access to the ribbon controls.

iii. Click Delete in the ribbon. When prompted to delete the associated data, DO NOT.

6. Execute the UPA Migrator.

a. Open in SQL Server Management studio `SQL_UpaMigratorALL.sql`, which was edited in step 3 d. above.

i. Execute the Query. Please be patient, this query takes a while to run. As a benchmark, it can run through around 6500 users in 30 minutes. The test run executed earlier will also provide an estimate.

ii. Record any errors and share them with your Skyvera contact.

b. Navigate one level up to the folder which you unzipped `SQL_UPAMigratorAll.zip`.

i. Open in SQL Server Management Studio `UPA_DROP_Indexes.sql`.

ii. Edit the USE statement on line one so that it has the correct name for your `NewsGator_SocialServices` database.

iii. Execute the query.

7. Re-create the Newsgator Social Platform Services service app. To do so,

i. Navigate to SharePoint **Central Administration > Application Management > Manage Service Applications**.

ii. Click New in the ribbon and select the **NewsGator Social Platform Services**.

iii. Provide the correct application pool and supply the database names that you recorded in step 1 above.