PUBLIC

SAP Jam Collaboration

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SAP Jam Collaboration Group Administration Guide

THE BEST RUN

Content

1 Getting started

1.1 About SAP Jam Collaboration

SAP Jam Collaboration is an enterprise social networking solution that allows you to bring your employees, partners, and customers together with the documents and application data necessary to enable effective, collaborative problem solving and decision making. These activities are organized in a structured form that provides intuitive access to content and discussions, while encouraging the pursuit of business-critical objectives, and while following established processes through SAP Jam "work patterns".

SAP Jam provides features such as the ability to create wikis and blogs, discussions on ideas, questions, and issues, and share images, videos, and documents—with document versioning—as well as providing tools to create and assign tasks, schedule meetings and calendar events, run polls, chat, and view and discuss data from external business-critical applications. These activities are organized within public or private groups that are internal to your organization or external to include customers and partners, and which can be based on templates designed to address specific issues, key business objectives, or services.

Terms of Use

When a group's Terms of Use is accepted by a user, the acceptance details - including the time stamp of when the user accepted the terms, and the version of the accepted Terms of Use - are logged in a compliance report. Group administrators can view and specify the date range for the "Terms of Use" report [page 126].

1.2 About the SAP Jam Collaboration Group Administration Guide

SAP Jam Collaboration group administration involves both group administrators and either company administrators or support administrators. Group administrators are typically regular SAP Jam users who have created a group, or who have been invited to help administer a group, so the documentation for the tasks that they can perform is normally located in the SAP Jam Collaboration User Guide. There are a few procedures, however, that require company administrator or support administrator privileges, and the documentation for these procedures is normally located in the SAP Jam Collaboration Administrator Guide. To provide a comprehensive guide that covers all aspects of the creation and management of SAP Jam groups, the groups information from each of these guides has been combined into this current one.

Organization of this guide

This *SAP Jam Collaboration Group Administration Guide* is organized into the following chapters:

1. **Getting started** Introduces this guide and describes its organization.
2. **Groups, group templates, and subgroups** Describes groups and their creation, which requires an understanding of group templates. It also explores the creation of custom group templates and subgroups.

   > i Note
   >
   > The creation of custom group templates requires either company administrator or support administrator privileges.

3. **Page designer** Explains how the page designer feature enables you to add and organize the layouts in your group overview pages by using SAP Jam widgets in a page editor.
4. **Widgets** Explains all the widgets you can use to design group overview pages. Company-specific widgets are described in the SAP Jam Administrator Guide.
5. **Member lists** Explains the creation of member lists, which are used to invite users to join groups.

   > i Note
   >
   > The creation of member lists requires either company administrator or support administrator privileges.

6. **Users and groups** Lists the various ways in which users can join, or be invited to join, SAP Jam groups.
7. **Manage groups** Shows the day-to-day management of SAP Jam groups, which includes configuring groups, converting groups from one type to another, populating a group's content section from a ZIP file, running groups reports, exporting groups for archiving, deleting a group, and restoring a deleted group.

1.3 Group admin menu

The Group Admin menu allows group administrators to edit, delete, copy, and move a group, extract a zip file to the Content folder, and save the group layout as a group template. Depending on the group's navigation settings, you can access the group administrator menu in one of two ways.

Sidebar navigation access to group admin menu

From the sidebar navigation, go to the *Group Admin* menu and click the dropdown.

Header navigation access to group admin menu

From the header navigation, go to the *More* dropdown and expand *Group Admin Settings*.

1.4 Feature tours

To help you understand various capabilities in SAP Jam without having to search for it in the help portal, you can conveniently access in application help presented as feature tours when visiting specific pages. You have the option to enable and disable feature tours throughout SAP Jam as needed.

A feature tour includes concise help text that can be dismissed at any time. It also contains links back to specific help topics in the SAP Jam Collaboration User or Group Administration guides. The following is a list of SAP Jam capabilities where you may see the help appear in a pop up dialog:

Feature Tours list for group administrators

Feature Tour	Help text summary
Learn about groups	Take this guided tour to learn more about groups. If you leave the tour but want to try it later, you can always access it from "?" icon on the top right corner.
Real-time messaging	Create and participate in real-time message threads with other group members using Messages.
Upload content	From the Content section, create or upload engaging content such as documents, images, and multimedia that provides useful information to group members.
Invite members	Click + Invite to expand your group by sending individual invites, importing a CSV list of people, or using member lists. Select people who can share their expertise and contribute towards group goals.
Engage and stay informed	Provide regular status posts through Feed Updates to keep your group informed. Use @mention to get someone's attention, @memberlist to inform a set of members, or @@notify to quickly broadcast to all members.
Table of contents generator	Format your heading text with heading styles 1 through 6. On the rich text editor toolbar, click the Table of Contents button to automatically insert a table with hyperlinked headings. If you change the heading text, click *Update* below the table to regenerate it.
Custom video thumbnail	From Video Manager, choose Thumbnails to upload your own video thumbnail image. Custom thumbnails can improve discoverability of your videos and increase number of views.
Knowledge base	Print a Knowledge Base Article: Click *Print* to generate a printer-friendly version of the knowledge base article. Move or Copy a Knowledge Base Article: Click *More* and then *Move* or *Copy* a knowledge base article within the same group or to another group.
Paste and upload images in forums	Copy and paste images directly into the rich text editor to create compelling content.
Design group overview	In the Overview section, you can add, edit, and rearrange multiple overview pages where you can highlight important group content. List the group's goals, welcome all members, promote important discussions, and feature specific topics.
Rotating banner for overview pages	Click *Add Widget*, then select the Rotating Banner widget to display up to 10 rotating images that can highlight important announcements, topics, and events
Monitor activity	After members begin participating and interacting in the group, use *Dashboard* to measure engagement such as the Collaboration score, activity trends, and leaderboards. Keep on top of the overall group participation levels.

i Note

The feature tours are only available for group administrators. Users who aren't group administrators can't see the feature tours.

Language support

SAP Enable Now is the tool used to provide the feature tours pop-up help. Currently, the following languages are supported:

- English: 'en'
- German: 'de'
- Spanish:'es'
- French: 'fr'
- Hebrew: 'he-IL'
- Brazilian Portuguese: 'pt-BR'
- Chinese: 'zh-CN'
- Japanese: 'ja'
- Saudi Arabia Arabic: 'ar-SA'
- Ukrainian: 'uk-UA'

  i Note

  Enable Now help is unavailable for users using an unsupported language.

2 Groups, group templates, and subgroups

2.1 About groups

Groups are a membership of users who can upload, create, or reference material specific to a department, project, or team.

Members can participate in a topic discussion with a select number or all members in a group. A company administrator can enable a user to create their own groups.

If this option is enabled in your SAP Jam configuration, you can choose from the following group types:

- **Public Groups**: Any of your company colleagues can join, view, and contribute content.
- **Private Internal Groups**: Members must receive and accept an invitation to join before they can post group items. This group can only be edited by SAP Jam administrators and group administrators. The group name, members, content, and description are not visible to anyone who has not been invited to join the group.
- **Private External Groups**: Members can collaborate with members of different companies in a private, invitation only space. This group can only be edited by SAP Jam administrators and group administrators.

Subgroups

Group administrators can also create subgroups organized within a main group. A main group can have none or as many subgroups as needed. This helps support the way work can be organized within a tiered structure, and with task delegation. For more information, see "Creating a subgroup".

Design the Overview page for a group

A group overview page is the default landing page for a group. This page can be used to present the group purpose, feature group members, and display the group's content. It may also show a group's regularly updated goals, a running task list, or any frequently updated group-related information. With the built-in page designer, you can use widgets to create multiple pages for the group Overview section to help organize and enable users to quickly find information in the group. For more information, see "About the page designer" in the SAP Jam User Guide.

> **i Note**
>
> Only group administrators can create and edit a Group Overview page.

Group Terms of Use

Group administrators can add a group-specific Terms of Use (TOU) that requires all users to read and accept the terms before they can be admitted to the group. When a new TOU has been added to a group with existing users, all access to that group will be revoked for each user until they have accepted the new terms. This is also true if the original TOU is updated to a newer version.

Create and Manage Large Groups

CSV Files for Group Invitations

When you want to invite a large number of colleagues or already have an external list, you can use a CSV file to easily upload those users into an invitation. It should have a new email address on each row of the first column of the CSV file.

Member Lists

Company administrators can create and publish a list of colleagues within a member list. You can use member lists when inviting large numbers of colleagues to a group within a single invitation. In addition to email address, first and last names, you can export group member lists to CSV file with the following information:

- member status (Admin, Member, or Alumni)
- membership join date
- last invited date
- added by member name
- invited reminders
- following
- email notification frequency setting

Group Membership, Invitations, and Administration filters

Over time, you may join several group and administer as many or more groups. To quickly find the groups you belong to, the ones for which you are the administrator, and the ones for which you have received an invitation to join, click *Groups* from the top menu bar. The group filters appear on the left side below your profile avatar. See Group filters [page 15].

Group Trash

When an item is deleted from a group, the item is moved to the Group trash. From here, group administrators and group members may recover any accidentally deleted group content. Anyone can view items in the group trash, including information such as item name, type, when it was deleted, and by whom.

While group administrators can restore or purge any item, members can restore or purge the items they own, and if "Full Access" permissions apply to item level and group participation, items they do not *own. Restoring

and purging can be performed individually or in bulk. Items deleted from private folders are accessible in the group trash to all group administrators and group members with private folders access.

Group administrators can enable the option to automatically purge items that have been in the Trash for a set number of days, also determined by the group administrator. By default, this setting is not enabled. When the group administrator enables it, the default number of days is set to 60. Anyone who accesses the Trash will see a notification about the auto-purge settings, if enabled.

To set up auto purge settings

1. On the group page, choose *Group Admin* on the group navigation menu.
2. Choose *Edit Group*.
3. Click the *Setup tab*.
4. Go to the Group Trash section at the end of the page. Select "**Automatically purge items that have been in the Trash for n days**", where n may be set to default 60.
5. Change the day value or accept the default of 60.
6. Click *Save changes*.

> **i Note**
>
> Purging an item is an irreversible operation.

* item ownership is defined as the user who originally uploads/shares the first version of a document, the user who uploads the latest version of a document, or the user who originally creates a wiki/blog post etc.

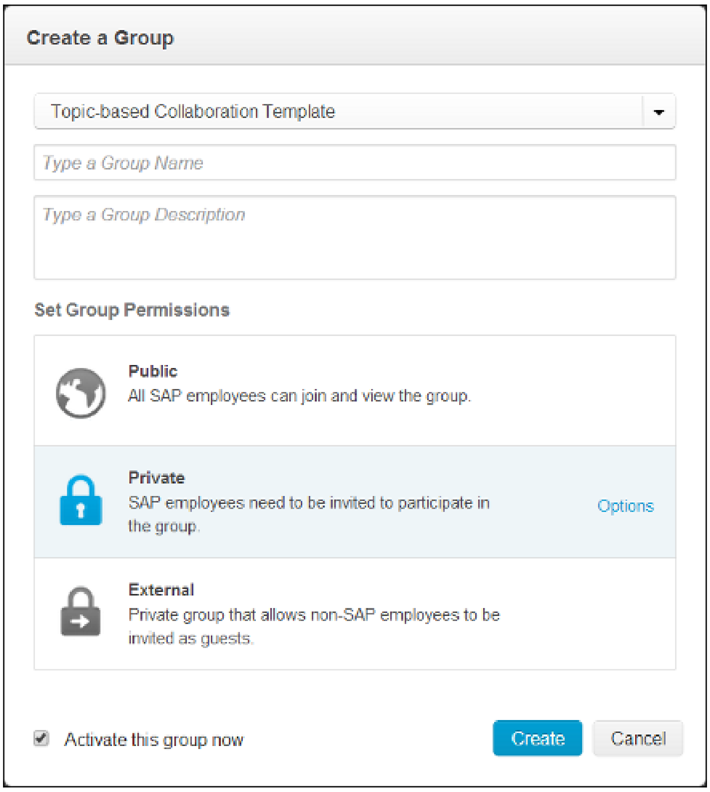
2.2 Create a group

Groups typically contain members with the same or similar tasks, projects, interests, or some other commonalities where one objective is to share information with people who were invited or approved to join a group. Group members and group administrators can create main groups. Only those designated as group administrators can create subgroups.

Create a group

To create a group

1. Go to the Group dropdown menu and choose *Create a Group*. The Create a Group dialog displays.



Create a group

2. Select a pre-designed page layout template from the drop-down menu. The templates you see may be different from the images presented in this guide as your company administrator may also publish custom templates. Group templates contain an overview page as well as placeholder content and group structure including discussion forums that help you quickly set up a group that's optimized to address specific business scenarios. For more information, see About group templates [page 16]
3. Enter a name for your group. Choose a name that would help users distinguish your group from others.

> **i Note**
>
> Group names are globally unique; if there is an existing group with the same name as yours, you must choose a different name before you can proceed.

4. Enter a description for your group. It can include the group's objectives and helps to inform others who might be interested. If the group is public, the description is visible to others and they can search for the group's description. When the group is private, the description is visible to your colleagues only after they have been invited or they join the group.
5. Select the privacy level for your group. There are three options to choose from:
    - *Public Group*: any user in the company can join.
    - *Private Group*: only invited users can join.
    - *External Group*: only invited users, inside and outside the company can join.
6. (optional) Click *Options* and set the following settings:
    - Select a Collaboration Level:
        - *Read-only*: Only group administrators can create, edit, and post items in the group. Non group administrator users can view and download group content, but they are not allowed to comment, tag, post or edit. Chats, discussions, polls, and tasks are not available. This level is suitable for broadcasting information.

    - *Limited*: Only group administrators can create and upload new content. All members can edit, post, comment, like, and view group content.
    - *Full*: Group administrators can create, edit, post, comment, like, tag, and view group content, and customize the upload policy. Non group administrator users can create, edit, post, comment, like, tag, and view group content.
- Set Invite Policy:
    - *All members*: All members are allowed to invite new members. This option is only available for public groups.
    - *All group members*: All group members are allowed to invite new members.
    - *Only group admins*: Only the group administrators are allowed to invite new members.
    - *Allow others to request to join this group*: This option provides a URL that can be sent in email or posted within SAP Jam for users to request access to the group.
- Set Visibility Policy:
    - *Allow others to discover this group*: The group becomes searchable to non-members, and they will be able to see the group name and description. They must submit a request to join the group and be accepted before they can access the group content. Selecting this option also automatically selects *Allow others to request to join this group*. You can disable either or both options when required.

        > **i Note**
        >
        > Private group discoverability is not currently supported for sub groups.

    - *Allow others to request to join this group*: Non-members can submit a request to become a member. Once accepted they can access the group content.
- Set Upload Policy (if you choose the full collaboration level, you can restrict the upload policy according to your needs):
    - *All members*: All members of your company can upload new content items. This applies to public groups only.
    - *All group members*: All members of your group can upload new content items.
    - *Only group admins*: Only group administrators can upload new content items. All group members are allowed to comment or edit content.
- Set Task Policy (if you choose the full collaboration level, you can restrict the upload policy according to your needs):
    - **All members**: All members of your company can upload new content items. This applies to public groups only.
    - *All group members*: All members of your group can upload new content items.
    - *Only group admins*: Only group administrators can upload new content items. All group members are allowed to comment or edit content.
- Set Moderation Policy: Under Full collaboration, when group members upload documents, photos, videos, wikis or blogs, the group administrator must first review and approve this content before it is visible in the group. This provides content publishing safe-guards to ensure content is appropriate for the business context within a group.

> **i Note**
>
> An "Activate this group now" checkbox at the bottom of the Group Creation dialog allows group creators to override the group activation default. The following defaults have been designed to support standard scenarios:

- Private groups: **Activated**
  - Group is automatically enabled and visible.
  - Group administrators or page designers prepare layout and content, and then invite users when ready.
- Public groups: **Inactive**
  - Most of the time, creators of public groups want to prepare the layout and content before members see it.
  - Users do not have to be members to see content in active public groups.
- API-generated group (for example, Account groups created for SAP CRM Accounts): **Activated**
  - Workflow assumption is that group is active.

7. Click *Create* at the bottom of the page.
8. (optional) From the group's page, click *Group Admin* and select *Edit* to view group settings. You can edit the following:
   - **General** tab: Change the group name, enter a description, change the group type to Public, Private, or External, set the invite policy, and select the group URL (for copying and pasting elsewhere, such as an email or wiki page).
   - **Setup** tab: Enter a Terms of Use user agreement, create a welcome announcement, set the group avatar, select the group navigation style, indicate whether the Overview page displays as the landing page, specify the default calendar view (as in: month, week, day, list), under *Customize what is available in this group*, enable or disable various left side navigation sections (for example, Messages, Recommendations, Content, Subgroups, Events, Forums, Links, Tasks, Knowledge Base), and enable external folders for integrated applications (for example, SharePoint, Alfresco One, SAP Document Center).
   - **Participation** tab: Set the collaboration level (as in: Read-only, Limited, Full) and task policy (i.e., Read-only, Limited, Full). *Enable @@notify* so users can send notifications to all group followers. You can also disable @@notify to help minimize unwanted notifications in large groups. *Enable Content Rating* allow users to rate group content.

> **i Note**
>
> It is possible for group administrators to change the group privacy level to Public, Private, or External after a group has been created.
>
> On the group page, when uploading an image for the group avatar, you can now rotate, pan, and zoom into the image or enable *Auto fit* so the image is sized to fit within the crop box without stretching or pixelation. When you are done, you can preview before saving the image.

2.3 Group filters

On the Groups page, you can filter the groups that display to help you find group and group activities more readily.

The following group filters are available:

- **My Groups**: A list of all the groups for which you are a member.

- **Favorite Groups**: Up to 10 of your favorite groups that are pinned to your Favorites bar.
- **Groups I administer**: Click to view a list of the groups you manage.
- **Group Notifications**: A list of notifications by group. For example, invitations to join a group.
- **Recent Group Activity**: A list of recent feed activity for the groups you follow.
- **Browse Groups**: A list of all other groups that are available for you to join. Includes the group name, description, and time elapsed since the last activity.

2.4 About group templates

As a group administrator about to create a group, you can use page designer to create your own layout, choose from a selection of out-of-the-box (or, if enabled, custom) templates that creates group content quickly and consistently.

These templates contain a professionally-designed overview page as well as placeholder content and group structure. For example, discussion forums that help the group owner quickly set up a group that's optimized to address specific business scenarios.

You can select a template to help you get started and save you time in designing a layout. After you select the template, you can still edit, add, and delete widgets on the layout as you would if you had designed the layout without a template.

> **i Note**
>
> Templates that are integrated with business records, (for example, Account Management, Opportunity Deal Room, Service Request Resolution, etc.) are available via the Business Records page. You will see a specific template only when you create a group based on a business object instance of that type. For example, you can select a custom "Sales opportunity methodology" template only when you create a new group based on an Opportunity business object type from SAP CRM.

To access group templates for a preview

1. On the global menu bar, choose *Groups* > *Create a Group*.
2. In the Template dropdown list, you can select a template and click *Preview*. The purpose and layout contents for the standard templates are listed in the following table.

Group Templates

Template name	Template purpose	What the layout includes (with widget type or custom info)

Topic-based Collaboration Template	Members can collaborate and share knowledge around a specific topic of interest.	• Group Overview page:
		  • Featured Content (Content)
		  • Forum Topics (Forum)
		  • Key Members (People)
		  • Folders (Content)

Template name	Template purpose	What the layout includes (with widget type or custom info)

		• Additional Information links
		• Latest Updates (Feed)
		• Most Active Members (People)
		• Group Forums page:
		  • General
		  • Discussions
		  • Questions
		  • Ideas

Customer Engagement Template	A group template designed to support external customer engagements, one example being work geared towards closing a Sales Opportunity.	• Group Overview page:
		  • Customer Related Documents (Content)
		  • Key Members (People)
		  • Presentation Materials (Content)
		  • Latest Topics (Forum)
		  • Latest Updates (Feed)
		• Group Content page folders:
		  • Presentation Materials
		  • Customer Related Documents
		• Group Forums page:
		  • General
		  • Discussions
		  • Questions
		  • Ideas

Design Registration Collaboration Template	A group template for channel partners and brand owners to review, discuss, and approve a design registration; intended for SAP Cloud for Customer (Cloud for Sales) transactions. Includes Pro/Con table to help analyze the design registration.	• Group Overview page:
		  • Latest Documents (Content)
		  • Active Tasks (Tasks)
		  • Latest Updates (Feed)
		  • Design Registration (Business Record)
		  • Featured Members (People)
		  • Important Links (Content)
		  • Latest Topics (Forum)
		• Group Content page folders:
		  • Official Documents
		  • Reference Materials
		  • Background Information

Education Center Template	Instructors, students, and experts can collaborate and discuss a training course. Experts can create content and share documents or expertise with all employees.	• Group Overview page:
		  • Course Information (Video)
		  • Instructors (People)
		  • Instructional Videos (Content)
		  • Latest Topics (Forum)
		  • Course Materials (Content)
		  • Latest Updates (Feed)
		  • Recently Joined (People)

<table>
<tr><th>Template name</th><th>Template purpose</th><th>What the layout includes (with widget type or custom info)</th></tr>
<tr><td></td><td>Employees can use search, activity feeds, tags, most-viewed, most-liked, and featured content to find the experts or content they need. Can be used when creating groups from a curriculum.</td><td>
Additional Information
Group Content page folders:
Instructional Videos
Course Materials
Group Forums page:
General
Questions
Ideas
i Note
For a company using the SuccessFactors Learning integration, when a group is created from a learning item business record using the Education Center group template, the learning item information displays on the group overview page with the same information that appears on the hover card when you hover over the name of the item in the business record browser.
</td></tr>
<tr><td>Event Coordination Template</td><td>Communicate event information such as event goals, location, agendas, speakers, and content to ensure attendees are informed and can fully engage in the experience whether participating virtually or on site.</td><td>
Group Overview Page:
Image
Text
Events
Featured Guest (People)
Multimedia - single video
Agenda
Important to Know (Content)
Event Location
Key Contacts (People)
Speakers Area:
Image
Text
Your Session (Text)
Popular Discussions (Forum)
Prepare Your Presentations (Content)
Key Resources (Content)
Featured Training (Multimedia - single video))
Sessions:
Image
Featured Sessions (Content)
Important Links (Content)
Live from the Event:
Live! (Multimedia - single video)
</td></tr>
</table>

Template name	Template purpose	What the layout includes (with widget type or custom info)
		• Video Recordings (Multimedia - playlist) • Latest Updates (Feed) • Popular Tags • Most Active Members

Global Assignment Community Template	A community for expatriate or employees on an assignment away from home to connect with other globally assigned employees in the same location, and discuss and find information on living and working in their new location.	• Group Overview Page:
		  ◦ Featured Resources (Content)
		  ◦ Featured Blogs (Content)
		  ◦ Hot Topics (Forum)
		  ◦ Forums
		  ◦ Events
		  ◦ Members
		  ◦ Resources
		• Group Content Page:
		  ◦ Resources
		  ◦ Events
		  ◦ User Contributions
		• Group Forums page:
		  ◦ Town Talk
		  ◦ Housing
		  ◦ Q&A
		  ◦ Buy & Sell

Help and Support Template	An internal-facing Q&A community designed for members and experts to help each other on a particular topic of interest.
	
	Most sections of the template would be questions within forums.
		• Group Overview page:
		  ◦ How-to Documentation folder link
		  ◦ Technical Support Page link
		  ◦ Ask the Experts (Forum)
		  ◦ News and Updates (Content)
		  ◦ Experts (People)
		  ◦ Questions (Forum)
		  ◦ Questions, Feedback and Feature Requests (Forum)
		  ◦ Popular Questions (Forum)
		  ◦ Related Groups
		• Group Content page folders:
		  ◦ News and Updates
		  ◦ How-to Documentation
		• Group Forums page:
		  ◦ General
		  ◦ Ideas
		  ◦ Help
		  ◦ Issues

Knowledge Sharing Template	A community where experts and coaches can	• Group Overview page: ◦ Experts (People)

Template name	Template purpose	What the layout includes (with widget type or custom info)

	connect and share knowledge on a particular topic.	• Featured Documents (Content)
		• Key Events (Events)
		• Latest Topics (Forum)
		• Forum Links
		• Latest Updates (Feed)
		• Popular Questions (Forum)
		• Group Content page folder:
		  • Expert Profiles
		• Group Forums page:
		  • Ask the Expert
		  • Feedback and Ideas

Mentoring and Coaching Template	Mentors and mentees can connect as a group and have private conversations.	• Group Mentoring page:
		  • This Week's Mentoring Topic (Content)
		  • Popular Questions (Forum)
		  • Group Discussion (Forum)
		  • How to Get Started (Tasks)
		• Meet the Mentor page:
		  • Members (People)
		  • Mentor's Biography
		  • One on One Mentoring
		• Group Content page folder:
		  • Mentee private folder
		  • Group mentoring
		• Group Forums page:
		  • General
		  • Questions
		  • Ideas

Partner Enablement Template	Enables valued partners with consistent value propositions, up-to-date product information, and other resources that will help them be highly successful in their sales deals.	• Group Overview page:
		  • Image
		  • Text
		  • Products 1, 2, and 3 (Image)
		  • In the News (Content)
		  • Featured Products (Multimedia - Playlist)
		  • Top Sellers (Content)
		  • Latest Knowledge Base Articles (Knowledge Base)
		  • Latest Discussions (Forum)
		  • Marketing Campaign Events
		  • Key Contacts (People)
		  • Latest Updates (Feed)
		  • Actions

Template name	Template purpose	What the layout includes (with widget type or custom info)
		◦ Related Groups • Partner Program Info: ◦ Image ◦ Text ◦ Upcoming Sales Training (Events) ◦ Related Groups ◦ Important Documents (Content) ◦ Key Contacts (People) • Products: ◦ Image ◦ Text ◦ Training Videos(Multimedia - Playlist) ◦ Q and A (Forum) ◦ Demonstration (Content) ◦ Guides and Specifications (Content) ◦ Pricing (Content) ◦ Warranty and Service (Content) • Customer References: ◦ Image ◦ Text ◦ Latest References (Content) ◦ Featured Customer (Multimedia - Single Video) ◦ Reference Team (People) ◦ Q and A (Forum) • Competitive Analysis: ◦ Image ◦ Text ◦ Competitive Analysis Documents (Content) ◦ Key Competitor (Multimedia - Single Video) ◦ Q and A (Forum) • How to Demo and Sell: ◦ Image ◦ Text ◦ Top Demos (Content) ◦ Demo questions and ideas for great demos (Forum) ◦ Demos by Industry (Content)
Planning and Implementation Template	A multiple tab template designed to quickly create groups intended for	• Group Overview page: ◦ Overall Status (Feed)

Template name	Template purpose	What the layout includes (with widget type or custom info)

	collaboration teams managing date-driven deliverables, goals and milestones,(for example, a professional services team managing project activities).	• Active Tasks (Task)
		  • Upcoming Events (Event)
		  • Key Members (People)
		  • Latest Documents (Content)
		  • Related Groups
		  • Important Documents (Content; Planning tab)
		  • Planning Milestones (Event; Planning tab)
		  • Important Documents (Content; Implementation tab)
		  • Implementation Milestones (Event; Implementation tab)
		• Group Content page folders:
		  • Overview Pages
		  • Planning
		  • Implementations
		• Group Forums page:
		  • General
		  • Discussions
		  • Questions
		  • Ideas

Sales Enablement Template	Provides sales teams with a collaborative enablement platform to optimize their product and process knowledge, and increase their win rates and sales revenue.	• Group Overview page:
		  • Image
		  • Text
		  • Products 1, 2, and 3 (Image)
		  • In the News (Content)
		  • Featured Products (Multimedia - Playlist)
		  • Top Sellers (Content)
		  • Latest Knowledge Base Articles (Knowledge Base)
		  • Latest Discussions (Forum)
		  • Marketing Campaign Events
		  • Key Contacts (People)
		  • Latest Updates (Feed)
		  • Actions
		  • Related Groups
		• Products:
		  • Image
		  • Text
		  • Training Videos(Multimedia - Playlist)
		  • Q and A (Forum)
		  • Demonstration (Content)
		  • Guides and Specifications (Content)
		  • Pricing (Content)
		  • Warranty and Service (Content)
		• Customer References:
		  • Image

Template name	Template purpose	What the layout includes (with widget type or custom info)
		- Text - Latest References (Content) - Featured Customer (Multimedia - Single Video) - Reference Team (People) - Q and A (Forum) - Competitive Analysis: - Image - Text - Competitive Analysis Documents (Content) - Key Competitor (Multimedia - Single Video) - Q and A (Forum) - Industry Reviews: - Image - Text - Latest Reviews (Content) - Featured Industry (Multimedia - Single Video) - Q and A (Forum)
Team Collaboration Template	Members stay organized, share resources and create a virtual presence for their existing team.	- Group Overview page: - Featured Documents (Content) - Team Meeting Notes (Content) - Top Contributors (People) - Latest Conversations (Forum) - Latest Updates Feed) - Recently Joined (People) - Group Content page folders: - Team Meeting Notes - Team Resources - Group Forums page: - General - Discussions - Questions - Ideas
Training Room Template	A group where learners and instructors can work together before, during, and after a training event. Can be used when creating groups from a curriculum.	- Group Overview page: - Announcements (Feed) - Learning Objectives (Text and Video) - Before You Begin (Tasks) - Timeline and Agenda (Events) - Course Material (Content) - Recently Joined (People) - Group Content page folders - Assignments - Module 1

Template name	Template purpose	What the layout includes (with widget type or custom info)
		◦ Module 2 ◦ Module 3 • Course Materials • Course Preparation (Instructors only) • Group Forums page ◦ General ◦ Questions ◦ Ideas **Note** For a company using the SuccessFactors Learning integration, when a group is created from a learning item business record using the Training Room group template, the learning item information displays on the group overview page with the same information that appears on the hover card when you hover over the name of the item in the business record browser.
Account Management Template *available from Business Records page	A group template designed to support collaboration and decision-making for a single Account from SAP CRM, by providing a comprehensive, 'live' view into account information pertinent to Sales and Customer Service. Groups created with this template display up-to-date Account information, including Opportunities and Service Requests. This template also displays business data from SAP ERP ECC for a particular customer. The "Orders" tab displays exceptional sales orders from an integrated SAP ERP ECC system. An account manager can gain insights into a customer's	• Group Overview page: ◦ Overall Status (Feed) ◦ About (Business Record Widget) ◦ Key Members (People) ◦ Related Groups ◦ Group Tasks (Task) ◦ Important Links ◦ Opportunities and Service Requests (Business Object List) ◦ Background and Document pages • Opportunities page (all Business Record List widgets): ◦ Latest Opportunities ◦ High Value Opportunities ◦ Closing Within 30 Days ◦ High Chance of Success • Service Requests page (all Business Record List widgets): ◦ Latest Service Requests ◦ Open Service Requests ◦ High Priority Service Requests ◦ Overdue Service Requests • Documents page: ◦ Official Documents (Content) ◦ Reference Materials (Content) • Background page: ◦ Introduction Video ◦ Background Information ◦ 5 Things You Need to Know ◦ Additional Resources

Template name	Template purpose	What the layout includes (with widget type or custom info)

	order management activity.	• Group Content page folders:
		  ◦ Official Documents
		  ◦ Reference Materials
		  ◦ Background Information

Opportunity Deal Room Template
 	
*available from Business Records page
	A group template designed to support Sales teams in collaborating around an Opportunity within SAP CRM, deciding on strategy, and finalizing documents, videos, presentations and other messaging required to close deals.	• Group Overview page:
		  ◦ Customer Related Documents (Content)
		  ◦ Opportunity Details (Business Record)
		  ◦ Sales Strategy (Content)
		  ◦ Top Contributors (People)
		  ◦ Presentation Materials (Content)
		  ◦ Forum Topics (Forum)
		• Group Content page folders:
		  ◦ Customer Related Documents
		  ◦ Presentation Materials
		• Group Forums page:
		  ◦ Strategy Discussion

Service Request Resolution
 	
*available from Business Records page
	A group template designed to quickly create a group to support the diagnosis, trouble-shooting, and timely resolution of a service request residing within SAP CRM, with the help of key experts. Requires the integration of SAP CRM and SAP Jam.	• Group Overview page:
		  ◦ Important Data (Content)
		  ◦ Service Request Details (Business Record Widget)
		  ◦ Key Members (People)
		  ◦ Latest Updates (Feed)
		  ◦ Problem Solving Steps (Optional) (Content)
		• Group Content page folders:
		  ◦ Problem Solving steps (contains wiki pages, ranking, pro/con table and decision tool)
		  ◦ Resources
		  ◦ Customer Data

Order-to-Cash
 	
*available from Business Records page
	A group template designed to manage and collaborate on a blocked order-to-cash business workflow. The template is accessible to a user at group-creation time, whenever the user attempts to create a new group from either a sales order or an invoice.	• Group Overview page:
		  ◦ Tasks
		  ◦ Sales Orders (Business Record)
		  ◦ Supporting Documents (Content)
		  ◦ Additional Resources (Content)
		  ◦ Latest Updates (Feed)
		  ◦ Related Groups
		• Group Content page folders:
		  ◦ Supporting Documents
		  ◦ Additional Resources

Quote Management	A group template designed to help an internal sales	• Group Overview page: ◦ Quotation (Business Record)

Template name	Template purpose	What the layout includes (with widget type or custom info)
*available from Business Records page	team manage and negotiate the terms of a customer sales quotation from SAP ERP ECC. The template is built with a specific set of tasks, that can be assigned to the group members. Alternatively, the tasks can be modified to suit specific business needs before they are assigned.	• Tasks (Task) • Latest Updates (Feed) • Related Groups • Supporting Documents (Content) • Group Content page folders: • Supporting Documents

2.5 Save as group template

If your company is going to have multiple groups with the same or similarly styled page layout, you can create a new template based on a particular group.

To save a group template from an existing group layout

1. Access the Group Admin [page 7] menu and choose *Save As group template*.
2. Enter a name for the new template, a description, select all or a specific language, and if applicable, a business record.
3. Click *Create*. The next time you or another group administrator creates a group, you can select this template form the page designer templates list.

2.6 Create a subgroup

Subgroups can contain a subset of members from a main group. This allows them to have a distinct subgroup environment in which to collaborate.

They are similar to regular groups, with these exceptions:

- Subgroups are a flat level and therefore cannot have subgroups themselves.
- Subgroup members must first be members of the main group.
  - If a member of the subgroup is removed from the parent group, they are also removed from the subgroup.
  - Inviting a user to a subgroup provides a required option to invite them to the main group, if they aren't already a member.
- Only group administrators can create subgroups.

- Group administrators can delegate administration of subgroups by promoting other subgroup members to subgroup administrators, but they must also remain subgroup administrators themselves.

To create a subgroup

1. Click the *Groups* dropdown menu and select the group that you want to add subgroups to.
2. Click *Subgroups*. Or, if subgroups already exist, go to the main group page and click *Subgroups* and then *Create Subgroup*.
3. Under the main group name, click *Create Subgroup*. The Create Subgroup dialog appears.
4. From the template dropdown menu, choose your preferred layout. You can click *Preview* beside each template to see an example of the layout before you apply it.
5. Enter a name for the subgroup.
6. Enter a description to help identify or explain the subgroup.
7. Select one of the following subgroup permissions:
    - **Public**: Group members with access to the main group can view and join this subgroup. Making the subgroup public only makes the group public to members of the main group and not to the entire company.
    - **Private**: Invitation-only access allows group members to view and join this subgroup. You can click the *Options* link to specify the degree to which members can collaborate (as in, read only, limited, full control), and set policy settings, again determined by collaboration level.
    - **Private (allow request to join)**: Depending on the selected group template, the "allow request to join" invitation option on the group is enabled. When this option is enabled the group title will be listed in the subgroups menu of the main parent group, and there will be an option for members of the main group to request to be invited to the subgroup. Until their request to join has been approved or they have been invited they will not have access to the subgroup.
8. By default the *Activate this group now* option is selected so that the group is active and available as soon as you click *Create*. You can clear this checkbox so that the group is created without making it visible to group members. This allows you to customize your group page, add content, create announcements, and add or modify other settings before you activate it.

2.7 Move a group to a subgroup

When there are organizational changes, existing groups may need to change their hierarchical relationship to accommodate those changes. Main groups can be moved to subgroups, subgroups can be moved from one main group to another main group, and subgroups can become their own main group.

As a group administrator, you can move a main group to a subgroup, provided that the main group does not have existing subgroups or subgroups yet to be purged from the group trash. The trash must be purged in its entirety whether a group is to be moved to a subgroup, a subgroup is moved to a main group, or one main group is moved to another group.

The next main group will inherit the member list of the moved group, and will apply the notification and following settings for each of those members.

> **i Note**
>
> Members of the new main group are not automatically added to the subgroup.

To move a group from the main level into a subgroup

1. Choose the main group from the Groups dropdown menu.
2. Access the Group Admin [page 7] menu and choose *Move Group*.
3. On the Move to pop-up window, enter the name of the main group that you want to move the group to. Click *Move*.
4. Read the confirmation message that appears. If you want to continue with the move, click *Move*.
5. A "this group was successfully moved" message appears. Click *OK*.
   You can also move a subgroup from one main group to another main group. Group members who do not have access to the new main group (e.g., because the main group is private and they are not already members of that group) that you are now moving the subgroup to must accept the invitation from the main group before they can access the subgroup again.

To move a subgroup into a subgroup belonging to a different main group

1. Go to the subgroup overview page.
2. Access the Group Admin [page 7] menu and choose *Move Group*.
3. On the Move pop-up window, click *Make this group a subgroup of another group*.
4. On the Move to pop-up window, enter the name of the main group that you want to move the subgroup to. If you don't know the full name, you can enter the first few characters of the group name until a drop-down list with suggested matches appears.
5. Select the group and then click *Move*.
6. Read the confirmation message that appears. If you want to continue with the move, click *Move*.
7. A "this group was successfully moved" message appears. Click *OK*.

To move a subgroup into its own main group

1. Go to the subgroup overview page.
2. Access the Group Admin [page 7] menu and choose *Move Group*.
3. On the Move pop-up window, click *Make this group a group on its own*.
4. Read the confirmation message that appears. If you want to continue with the move, click *Move*.
5. A "this group was successfully moved" message appears. Click *OK*.

Example invitations automatically sent to users upon moving subgroups

Where members do not already belong to the new, main private group where a subgroup has been moved to, they will see a bell notification similar to the following:

"[Group administrator name] has invited you to join the group "[Main group name]". This is a private group on [Product Instance name]. The group "[Subgroup name]" was moved to this group."

For those users who were members of the other main group where the subgroup used to belong, but not yet members (e.g., invited but in pending status as they have yet to accept the invitation) of the actual subgroup, they will see a bell notification similar to the following:

"[Group administrator name] has invited you to join the [Subgroup name] group, a subgroup of [Main group name]. You will become a member of both groups when you join the [Subgroup name] group. This is a Private/ Public Group on [Product Instance name]."

2.8 Copy a group

As a group administrator, you can copy a group as a means of saving time and effort in designing the same overview pages and uploading the same content and folder structure to a new group. You'll automatically become the sole member and group administrator for the copied group.

Copy an existing group

To copy an existing group

1. Go to the group you want to copy, access the Group Admin [page 7] menu and choose *Copy Group*.
2. Enter a new group name to differentiate it from the original, or accept the default name which adds the suffix "(Copy)" to the a copy of the original group name.
3. A "Your group content is being copied" message displays while a copy of the group finalizes. The content owner for all copied content will be the group administrator who performed the Copy action. You can navigate away from this page in the meantime.

All copied content will display as "Version 1" in the single item view version history.

> i Note
>
> - Forums, feed activity, events, tasks, reports, trash items, mirrored content items, content item metadata (e.g., content ratings, number of likes and views) and dashboard activity metrics are not copied to the new group as they are applicable in context only to the original group.
> - Group members and any other group administrators from the original group are not automatically invited to the new group.
> - When a group is cloned, knowledge base articles are also copied as part of the overall group content to the new group.

2.9 Mentoring and coaching groups

Mentoring and coaching groups in SAP Jam help to improve employee engagement with easy customization, forums for discussions or questions and answers, embedded feed updates, and mentor profiles with listed areas of expertise.

With the SuccessFactors Succession and Development integration, you can create an SAP Jam group linked to a mentoring program created with SAP SuccessFactors Mentoring Program Tool.

Create a Mentoring Program with SAP Jam group

To create a mentoring program that integrates with an SAP Jam group

1. Refer to the steps for Creating Supervised or Unsupervised Mentoring Programsin the SAP SuccessFactors Succession and Development Mentoring Guide .
2. Ensure that you select the *Create an SAP Jam group linked to this mentoring program* option.

The mentors and mentees that are added to the mentoring program are also automatically invited to the SAP Jam group. They can view the group feed updates under the My Mentoring Programs page in the Development module. Mentoring program administrators are automatically promoted to group administrators of the SAP Jam group.

2.10 Professional services groups

Groups created with the professional services project room template can support an extended project team with planning, implementation, and project rollout. Team members make decisions around resourcing, gather to discuss project requirements, and capture decisions.

With SAP S/4HANA Professional Services Cloud integration, when creating an SAP Jam group you can select an enhanced version of the Professional Services Project Room Template that provides contextual project information. The template includes business record widgets specific to projects on the "Overview" and "Project Details" pages.

> **i Note**
>
> To work with this integration, your company administrator must follow the configurations steps in the SAP Best Practices Social Collaboration Configuration Guides.

In SAP S/4HANA, once the SAP Jam group is created with the Professional Services Project Room Template, you can click *Show Discussion* to view group feed activity. You can also click the drop-down above the discussion to view the list of SAP Jam groups associated with the project. Projects can be featured in existing groups.

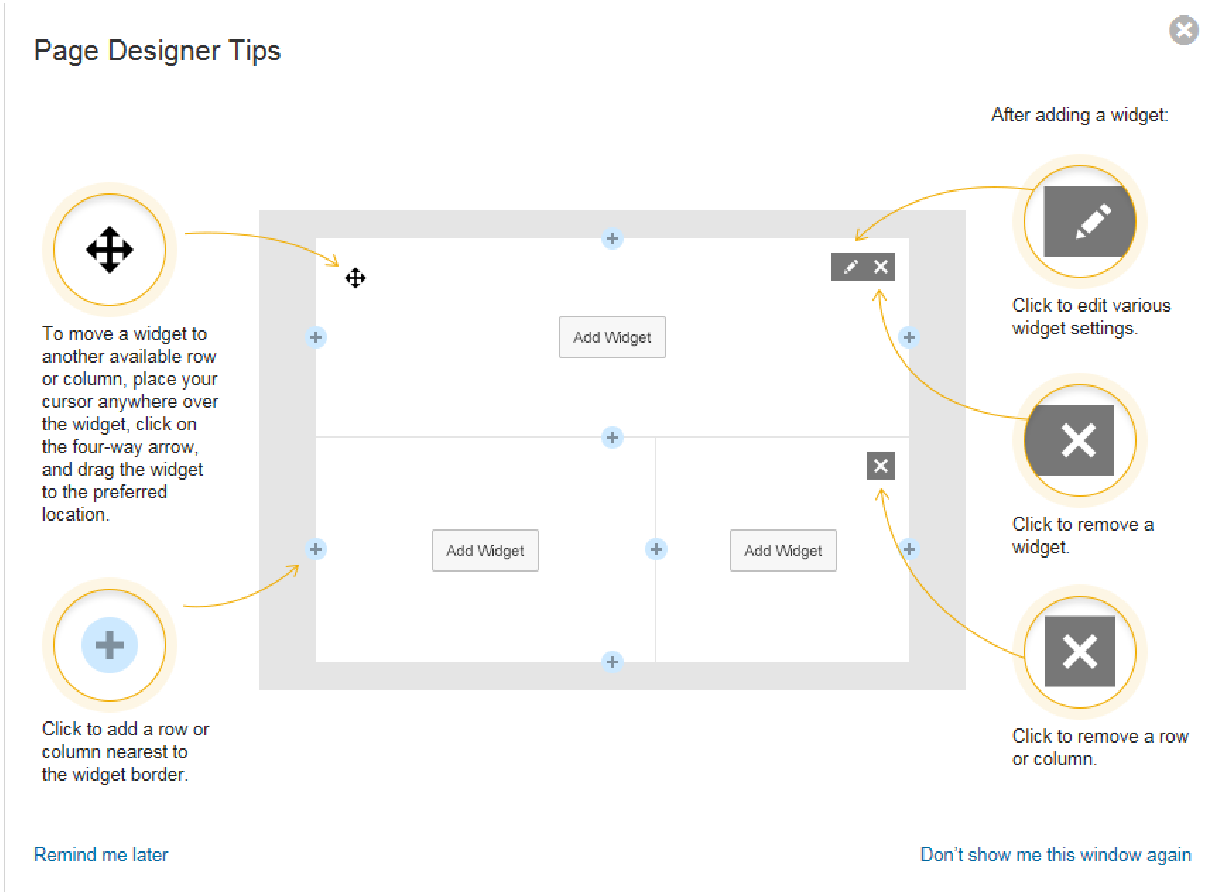
3 Page designer

3.1 About the page designer

After a group is created, as a group administrator, you can begin to create some page layouts for the group content and information. The page designer feature enables you to add and organize the layouts in your group overview pages by using SAP Jam widgets in a page editor. Widgets provide a way for you to collect and share information from colleagues, customers, or other members within the group. For example, you can use the Event widget to allow customers to register for an event, create a question and answer forum for new employees with the Forum widget, or show a link to a video withe the Video widget.

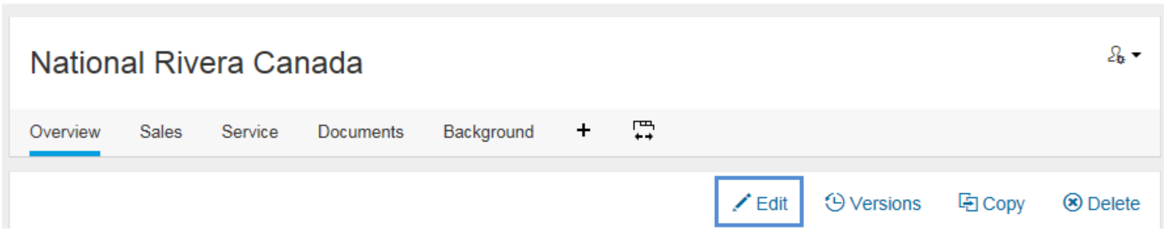
The drag and drop convenience in the page designer enables you to create pages without any knowledge of HTML. You can add, move, resize, align, configure widgets, and modify the overall layout of a page. As you design a page, your work is automatically saved so that you don't lose your changes prior to publishing or saving as a draft. The Overview page is also searchable. Content on the Overview page (such as text widgets, widget titles, and widget captions) is now indexed and searchable using the SAP Jam global search box. The simplified yet powerful page designer is available in the *Overview* section.

> **i Note**
>
> You can no longer edit overview pages in a wiki editor, as per the wiki-based overview page feature deprecation that began as of the November 2014 release. If you click **Edit** to edit the existing wiki overview page, you will see a prompt to begin using page designer. The wiki page will be accessible as view only; this allows you to copy the HTML for the wiki in case you would like to maintain a back up copy elsewhere. When content is converted from HTML to page designer, the layout order of the content is preserved as closely as possible. As you upgrade to page designer, you'll discover that the widgets are more powerful, easier to use, and take less time to configure than it does to enter HTML. Page designer provides pop-up help when you place your cursor over each widget to explain it's purpose and how you can apply it to the page layout.



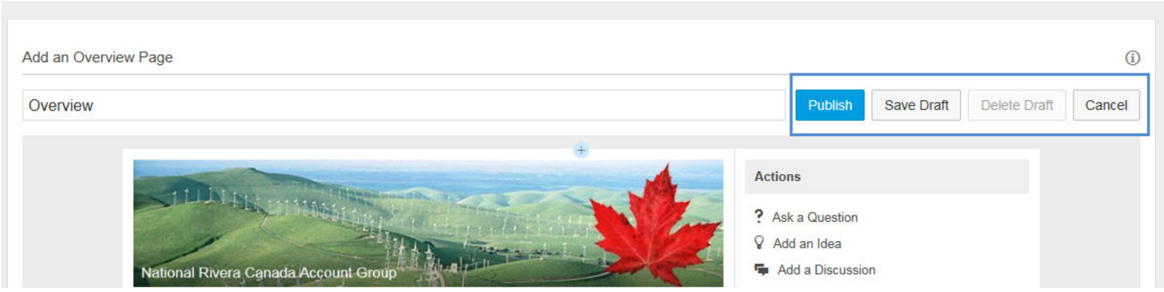
Getting started with page designer help

- To switch to page designer view while you are in regular page view, select the page tab that you want to work on and then click *Edit* below the Group header .



Edit a page tab

- To move a widget, simply click it, drag, and drop.
- To delete a widget, click the "X" icon on the top right hand corner of the widget.
- To edit a widget's property, click the edit icon on the top right corner of the widget.
- To show page designer tips, click the information icon that displays in Edit view, above the Publish, Save Draft, Delete Draft, and Cancel buttons.
- To save a draft of the page without publishing it, click *Save Draft*.
- To display your completed page to the group, click *Publish*.



Publish and save draft actions

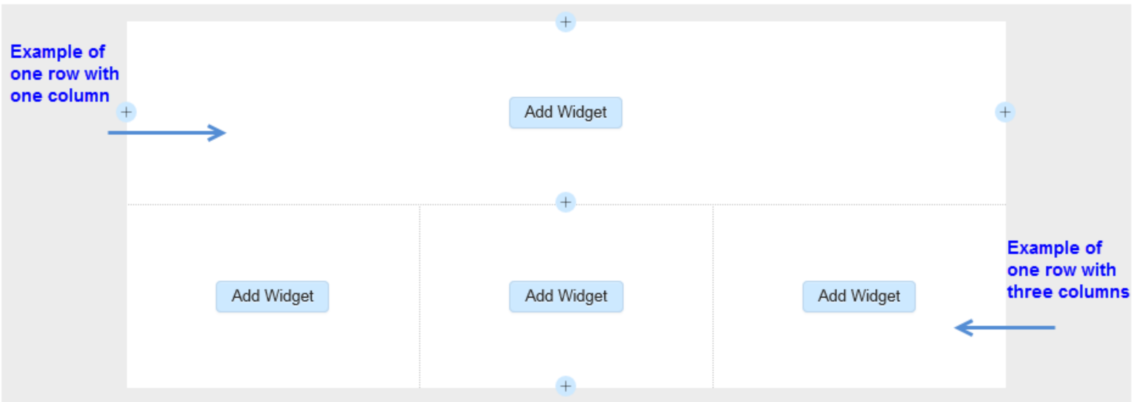
You do not need to position any "cursor" for insertion and deletions on a page. In the page designer, cursor placement is now only relevant when editing the contents of a text widget.

3.1.1 Add rows and columns

You can edit the page layout while you are creating a new page or after its creation. You can add a maximum of three columns (with sidebar navigation) or four columns (with header navigation) within a row and one row within a column. A page can have several rows, however this may cause the user to scroll vertically to view and access all the page content.

To add a new row or column in page designer view

1. Click the + icon on the vertical or horizontal edge nearest to where you want to add the row or column. For example, if you click + on the left side edge of a row or column, the widget is added to the left. If you click + on the top edge of a row or column, the widget will be added above the current widget.



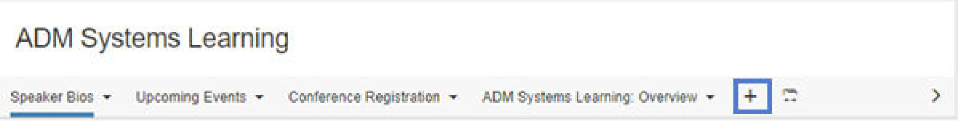
Add rows and columns for group with sidebar navigation

3.1.2 Add new pages

You can use the page designer to create new pages. Adding pages can help you create structure, organize information, and make it easier for members to work with different actions and information. You can add pages to the top horizontal level or as second level vertical navigation.

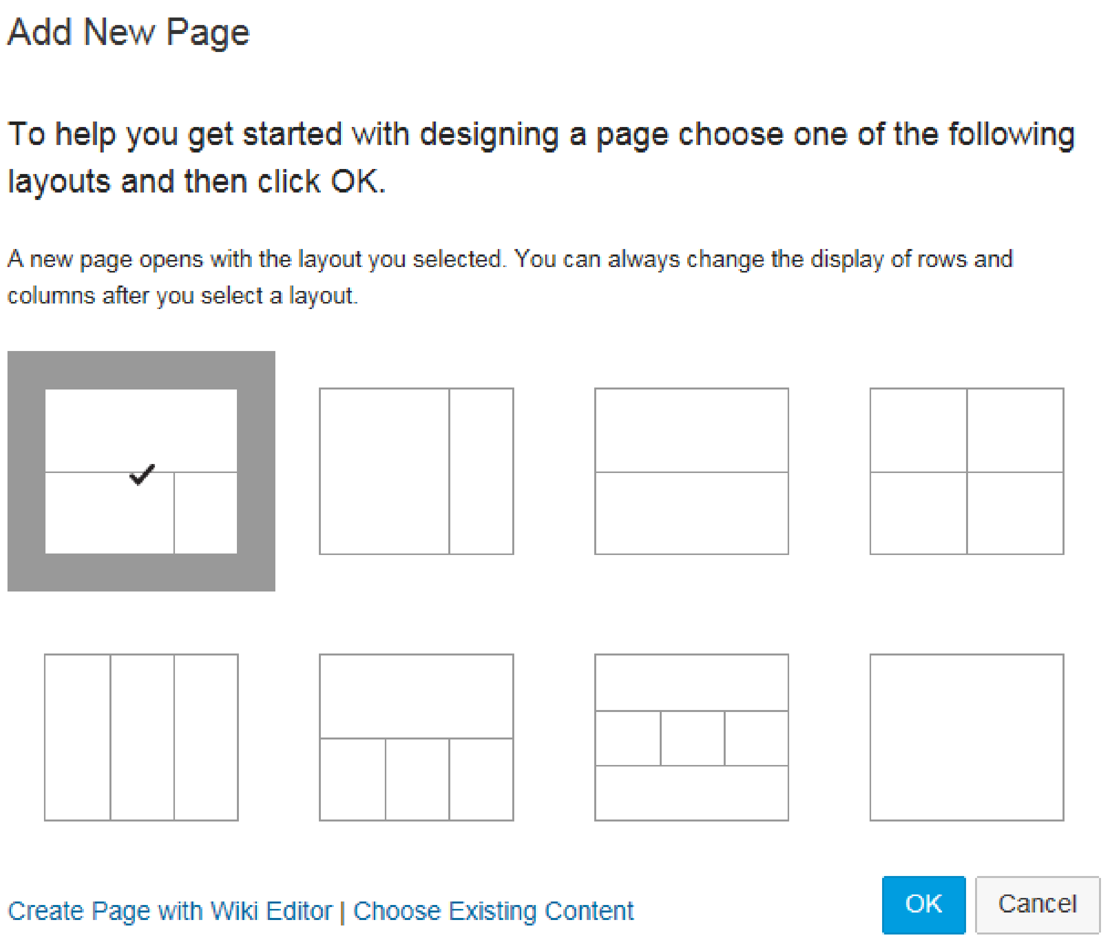
To add a new page

1. Click the + at the end of the named page tabs to add a new top level page.



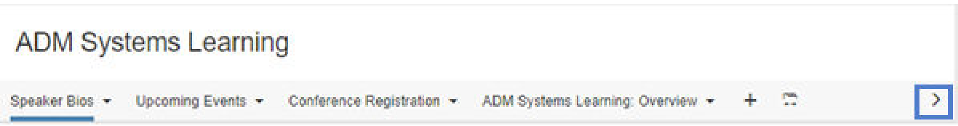
Add new page

2. The Add New Page pop-up appears. Choose a layout and then click *OK*.



Choose a layout

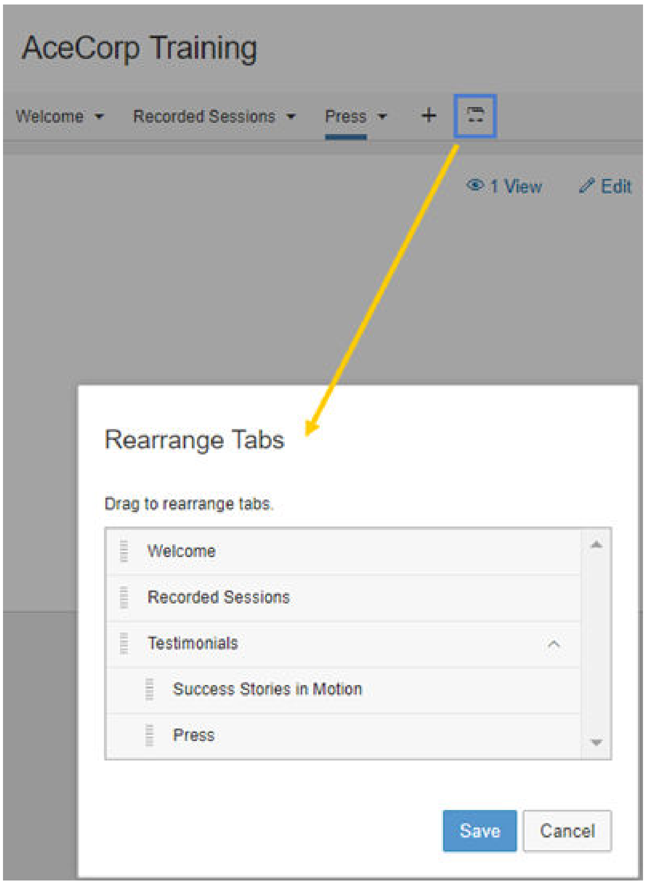
3. In the Title text box at the top of the page, enter a name. After you click **Save Draft** or **Publish**, the page name you entered will display to the right of the Overview tab. If the page name is longer than the width of the page layout, and you have multiple pages, the pages will appear when you click the right arrow to the far right of the named pages.



Show more pages

4. To create second and vertical level menu tabs to support the organization of large groups and communities, click the drop-down arrow beside the named page and click *Add New*. Follow the previous steps 2 and 3.

5. As you create your pages, you may need to change the order in which they are presented from left to right. Click the *Rearrange Tabs* icon to view a list of all page tabs including second level tabs, and then click and drag. You can move a first level tab to a second level tab, or from second to first. You can also move a second level tab to the second level of another tab.
6. Click *OK*.



Rearrange tabs

i Note

- When you restore a second level navigation tab under a top level tab that's been deleted, SAP Jam will restore the second level tab as the new top level tab.
- When you delete a top level tab, all second level navigation tabs will also be deleted and no longer accessible.
- When you restore a top level tab, it will be restored to its previous state, along with the second level navigation. For example, all second level tabs that were visible will become visible again, and any second level tabs that were explicitly deleted will remain deleted and no longer appear.

3.1.3 Adjust column width

Column widths can be adjusted within two-column rows. The following column sizes are allowed: 240px (1 standard column), 300px, 360px (2 equal columns), 420px, and 480px (2 standard columns).

To adjust the width of a column

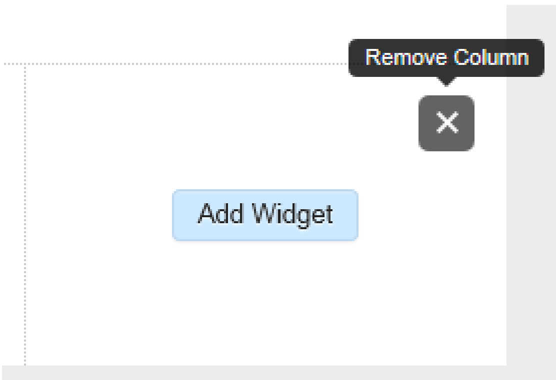
1. Place your cursor over the left or right border of the column until the cursor changes to the resize arrows.
2. Click and drag the border to the left or right as needed. The other widget in the column will automatically resize and align itself within the column.

3.1.4 Delete rows and columns

You can edit the page layout while you are creating a new page or after its creation. Rows and columns can be deleted once widgets have been removed.

To delete a new row or column in page designer view

1. If there are widgets contained within the row or column, place your cursor or focus on the rop right corner of the widget and click *X* to remove. You can only delete a row or column after you delete all widgets from that area.
2. Place your cursor or focus on the top right corner of the column or row and click *X* to remove the row or column.



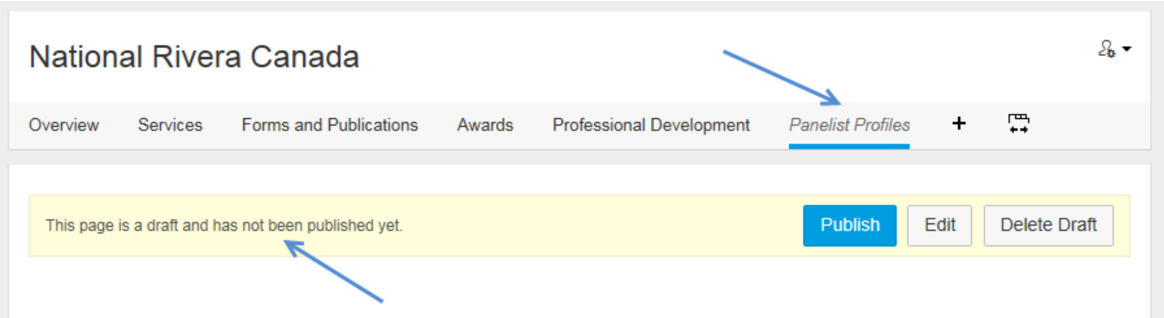
Delete row or column

3.1.5 Save or delete draft

You can save a draft of the page tab you are working on before publishing for all group members to see. If you change your mind and do not wish to save, you can also choose to delete the draft.

To save a draft of your page

1. If the Title text box is blank, enter a title for the page.
2. When you are finished making edits to your page, click *Save Draft* beside the Title text box. The page will be saved and added as the last page. If it has never been published, the page tab name will appear in italics and the message "This page is a draft and has not been published yet" appears.



Saved draft of a new page, in italics

If the page has been previously published, you will see the message "This draft has not been published yet." with a hyperlink to view the published version.

To delete the draft

1. Go to the draft version of the page by clicking the page tab and selecting *View draft version*.
2. On the yellow banner with the message "This draft has not been published yet", click *Delete Draft*.
3. On the confirmation dialog, click *OK* to confirm your draft deletion.

3.1.6 Publish a page

When you publish a page, you are enabling group members to view and work with a completed version of the page.

To publish a page

1. When you are finished making edits to a page, beside the Title text box, click *Publish*.
2. The Publish dialog displays. You can accept the default option, *Show in Feed Updates*, if your edits were significant and you want to inform group members via the feed that the page was updated. Or, if the edits were not as significant, you can disable that option and the update will not appear in the feed.
3. If it's a major change, enter some comments to describe the changes. This information will display in the feed and version history.
4. Click *Publish*. You can view the assigned version number when you click Versions [page 38].

3.1.7 Edit a page

You can edit pages for a group within page designer. Edits can include updates to selected widgets, rearranging their presentation, or adding and removing content to name a few.

To edit a page

1. On the group page, click the page tab that you want to edit.
2. Click *Edit* below the page tabs.
3. Proceed to make your changes.
4. Once you have completed your changes, click *Save Draft* or click *Publish* if you are ready to display the page to group members. If you no longer want to save a draft of or publish the version, you can click *Cancel*.

3.1.8 Rename a page

Page tabs can be renamed as you work on a draft or even after it's been published. The new page tab name appears when you save the draft or publish it. If you revert to a version prior to the name change, you will see the previous page name when it's published.

To rename a page tab

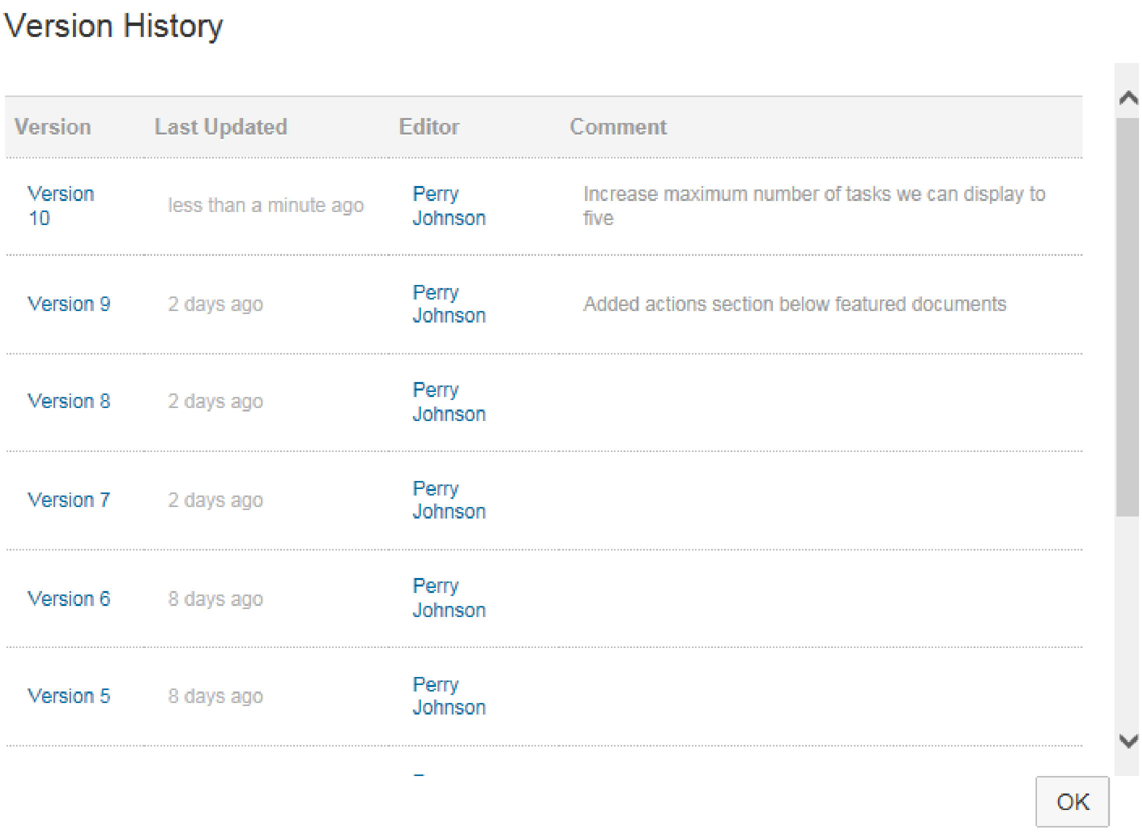
1. From the Overview section, click the page tab you want to edit, and then click *Edit*.
2. Below the "Edit Overview Page" header, enter the page name for the page tab. The page will be auto-saved with your latest name change.
3. Once you are finished your changes, click *Publish* or *Save Draft* to save a version of the page tab with the new name.

3.1.9 Page versions

As you create and edit group pages, SAP Jam stores versions of your work. You can use it to view previous saved versions of your pages, when it was last updated, and also the name of person who last updated it. You can also revert to a previous version to make it the latest version.

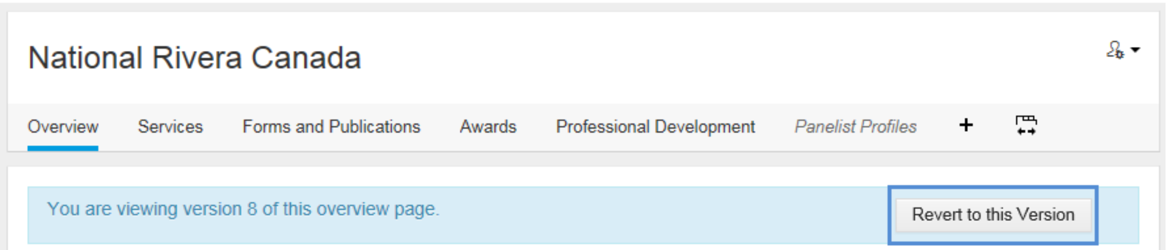
To use the Versions feature

1. Select the tab you want to view version history for, and then click *Versions*. The Version History pop-up displays.



Page tab version

2. To view a particular version, click the version and number under the Version column.
3. The Overview page appears with a banner message to indicate which version of the saved changes you are viewing.
4. If you want to undo your most recent changes on a selected page tab and go back to a previous version, click *Revert to this Version* on the blue banner.



Revert to the version you selected

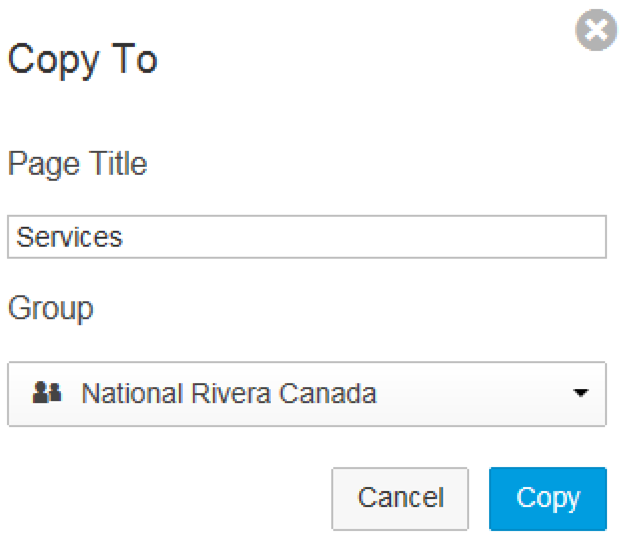
5. Return to the Version History dialog by clicking *Versions*. Notice that another version has been added to the history; this is the reverted version.
6. Click *OK* to close this window.

3.1.10 Copy a page

To save you time and effort in designing similar pages for one or more groups, you can use the Copy action to make a copy of an existing published page. The layout and all the widgets will be copied. You can then select the page and make changes as necessary.

To copy a page

1. Select the page tab that you want to copy. A blue bar underlining the page tab name will indicate that it has been selected.
2. Click *Copy*. The Copy To pop-up displays.
3. Enter a new title for the page tab and choose the group that you want the page copied to.



Copy a page dialog

4. Click *Copy*. A "page copied successfully" message displays. You can click *View Page* to look at the copied group page or click *Close*. The copied group page appears as the last page tab.

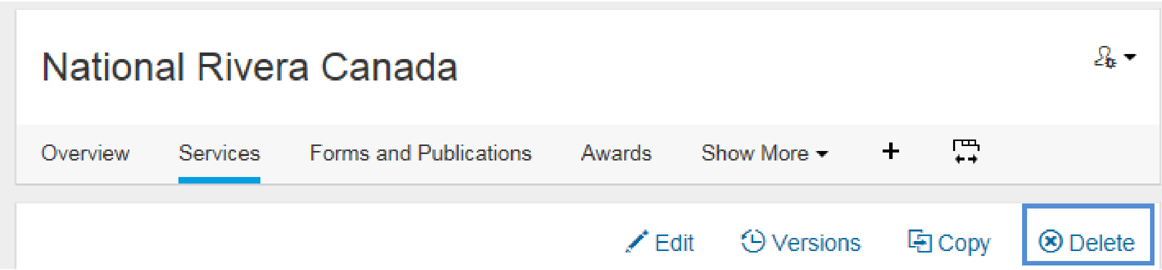
> **i Note**
>
> When copying a group overview page, ensure that you update any image, multimedia, and slideshow widgets to reference content belonging to the group you've copied the page to.

3.1.11 Delete a page

You can remove any and all pages for a group. If you've deleted a page in error, the page can be restored by the group administrator.

To delete a page

1. In page designer view, click the page tab that you want to remove and click *Delete*.



Delete action in page designer view

2. A confirmation message displays. Click *Confirm* to confirm the page deletion. The page is moved to the "Trash" section where it can be restored or purged.

3.1.12 Translations

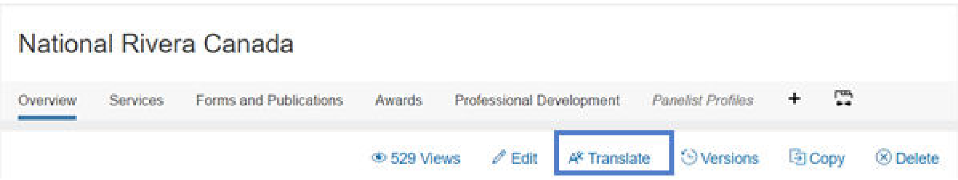
When you create or edit an overview page and supply text, the text is considered untranslated. To support organizations with employees who understand multiple languages, you can provide translations for individual text for image captions, menu tabs, text widgets, and widget titles in one or more languages supported by SAP Jam.

> **i Note**
>
> All existing overview pages prior to the May 2017 release will continue to display untranslated text.

Translate menu tabs, text widgets, widget captions, and widget titles

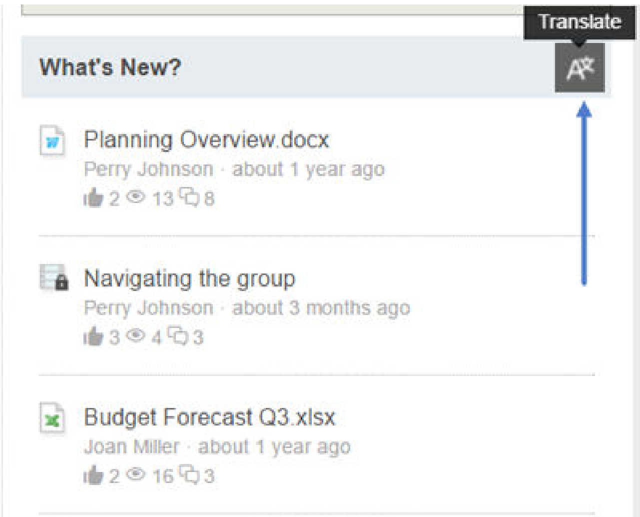
To translate elements of the group overview pages

1. On the group overview page, click *Translate*.



Translate action on group overview page

2. Select the language you want to work in for your translations from the Language drop-down.
3. Click the *Translate* icon on the top right corner of the individual images and widgets and then enter the translations to the widget captions and widget titles on the Translate dialog.



Translate the widget title

4. Enter the translations for the menu tabs at the top of the overview pages, to the left of the Publish and Cancel buttons.
5. Enter the translations for the content of the text widget.
6. Repeat all the previous steps for all other languages you wish to translate, and then click *Publish*. This creates a new version for your overview pages. If you are not ready to publish your translations, you can save your work in Draft mode.

If a translation is unavailable, the non-translated locale that was used when creating or editing the page displays. A user will see the translations based on their preferred language setting. If their preferred translation is unavailable, they will see untranslated text.

Similar to saving an overview page or custom home page as a draft, you can also save translations as a draft. Draft translations are not visible to end users. As a group administrator, you can view either draft translations or published translations. You can resume editing a draft, delete a draft, or publish a draft. Each time you publish a translation, a new version of the overview page is created in the version history.

When you click *Publish* to publish the translated overview page, this creates a new version. You will be prompted to enter a comment about your changes relating to translation, or you can accept the default pre-filled comment indicating that this version update is due to translation.

3.1.13 View counter

You can track the number of page views for your overview pages to help you determine the traffic or popularity of your group pages.

As a group administrator, you can see the number of page views and download a list of SAP Jam users (referred to as "unique viewers") who viewed overview pages. The counter tracks when a particular user last visited, but not the number of times they visited.

To view the number of viewers and who viewed the Overview page

1. Go the the Overview page of a group for which you are the administrator.
2. Click on the view count that appears to the left of the Edit command. The number indicates how many your page has been visited.

3. The list of unique viewers displays. Click **Download** to download the statistics into Microsoft Excel see when each viewer last visited your Overview page, which version number was viewed, whether they viewed the latest version, and their profile data such as first name, last name, job title, and email address.
4. Click **Close** to dismiss the Unique Viewers window.

3.1.14 Dimensions

Understanding the dimensions of group pages and their components can help you when designing widgets and placement of images.

Overview pages in full width resolution

- Overview full page width: 880 pixels.
- Overview page by column:
  - 270 pixels per column with pixel padding width of 20 between columns 1 and 2 and 2 and 3.
  - Margins on both sides are 20 pixels each.

Widgets containing images

- Suggested image size: 267.8 pixels for 1 column widget

3.1.15 Mobile settings and preview

As a group, area, or company administrator responsible for designing page layouts to display content and information, you can enable or disable widgets as needed for viewing within a single column on a mobile device.

Show widgets in mobile view

When designing the view of group pages on mobile devices, you should decide which widgets will display best in a single column layout. For example, for custom home pages viewed on a laptop browser, rotating banner widgets that use a larger amount of the screen may display better than they would than on the more compact screens of the SAP Jam mobile app or mobile browser. You could then disable the "Show in Mobile" toggle for the rotating banner widget.

To designate which widgets to display in mobile view

1. In Edit mode for your group overview, area, or custom home page, hover your cursor over the top right corner of the widget title to see the toolbar.

2. Move the *Show in Mobile* toggle so that the check mark displays, indicating that it is enabled. You can always switch the toggle to disable it.
3. Repeat the steps above for all widgets you wish to show or hide.
4. Click *OK* to save your settings.

Pin widgets to the top of screen for mobile view scrolling

After you've decided which widgets you'd like to display in mobile view, you can then choose which of those widgets should display closest to the top of the screen for immediate visibility. You can also re-order them.

To pin the displayable mobile-view widgets to the top of the screen

1. In Edit mode for your group overview, area, or custom home page, hover your cursor over the top right corner of the widget title to see the toolbar.
2. Move the *Pin to Top* toggle so that the check mark displays, indicating that it is enabled. You can always switch the toggle to disable it.
3. Repeat the steps above for all widgets you wish to show at the top.
4. Click *OK* to save your settings.

Reorder widgets and Preview mode

In edit mode, you can switch to a preview mode of the single column layout for mobile devices. You can also re-order your pinned widgets to set which ones display from top to bottom.

To preview and reorder widgets for mobile devices

1. In edit mode or your group overview, area, or custom home page, click *Preview in mobile* at the top of the page. A preview dialog box displays.
2. Scroll down to view the pinned widgets.
3. Hover your cursor over the top right corner of the widget to see the up and down arrows. You can click those arrows to move the widget up or down as needed.
4. Click *OK* to save your pinned widget order.

4 Widgets

4.1 About widgets

Widgets are containers for a variety of content types such as video, feeds, and photos. When you add a widget, you are specifying that a section, whether for group overview pages, custom company home pages, or custom area home pages, contain some particular content. You can insert, remove, edit, and reposition widgets as needed.

The following is a table of all widgets, where they are located, what they are used for, and the settings associated with each widget type.

> **i Note**
>
> Company administrators designing custom home pages and area administrators designing area home pages will see a few different widgets in addition to some mentioned in this topic: Name, Notification, Recommendation, Recent Items, Rotating Banner, and Catalog Search widget. Those widgets are explained in more detail in the SAP Jam Collaboration Administration Guide.

Category	Type	Purpose
Standard Tools	Multimedia	Show a link to an external audio or video file, display multimedia saved to the group content library, or a playlist.
Standard Tools	Image	Select an image from a local computer folder or directly from the group content repository.
Standard Tools	Text	Insert and format text within a rich text editor. Can also include tables and lists.
Standard Tools	Slideshow	Select a Microsoft PowerPoint presentation files.
Standard Tools	Name	(Company and Area home page only) Show avatar and name of the logged in user.
Standard Tools	Rotating Banner	Show a carousel with up to 10 slides of headlines or news.
Filter and Lists	Search	Search all content for the group.
Filter and Lists	People	Show a list or carousel rotation of group members based on a selected filter.
Filter and Lists	Groups	Link to other groups or subgroups.
Filter and Lists	Tag Cloud	Show the most popular hashtags in a tag cloud.
Content and Documents	Content	Show content such as documents, blog posts, videos, images, links, and much more.
Content and Documents	Forum	Show questions, ideas, and discussions.
Content and Documents	Event	Show an upcoming or recent event.
Content and Documents	Knowledge Base	Shows list of published knowledge base articles.

Category	Type	Purpose
Extensions and Integrations	Business Record	Shows details for a specific business record (for example, ID, main item name, status, closing date etc.) for business data such as Accounts, Opportunities, and Service Requests, from SAP CRM and for learning data from SAP SuccessFactors Learning.
Extensions and Integrations	Tool Content	Shows the pro/con comparison table, agenda, or extensions (for example, Google Maps, SurveyMonkey).
Extensions and Integrations	External Content	(Company and Area home page only) Show external applications content from external folder.
Productivity	Feed	Insert activity feed based on selected filter. **i Note** Only one feed widget can be inserted per page.
Productivity	Action	Show a list of popular actions for the user to choose from.
Productivity	Task	(Groups only) Insert a task activity.
Productivity	Notification	(Company and Area home page only) Show summary of all notifications.
Productivity	Recommendation	(Company and Area home page only) Show a list of recommended content, people, and groups.
Productivity	Recent Items	(Company and Area home page only) Show a list of recently viewed content and groups.

Add, Move, Delete, or Edit a Widget

To add a widget anywhere it is allowed on a page, click the corresponding “Add Widget” button.

By default, a widget is added to the bottom of a column. It can be moved easily elsewhere on the page.

- To move a widget, simply click, drag, and drop.
- To delete a widget, click the "X" icon on the top right hand corner of the widget.
- To edit a widget's property, click the edit icon on the top right hand corner of the widget.

There is no need to position any “cursor” for insertion and deletions on a page. In the page designer, cursor placement is now only relevant when editing the contents of a text widget.

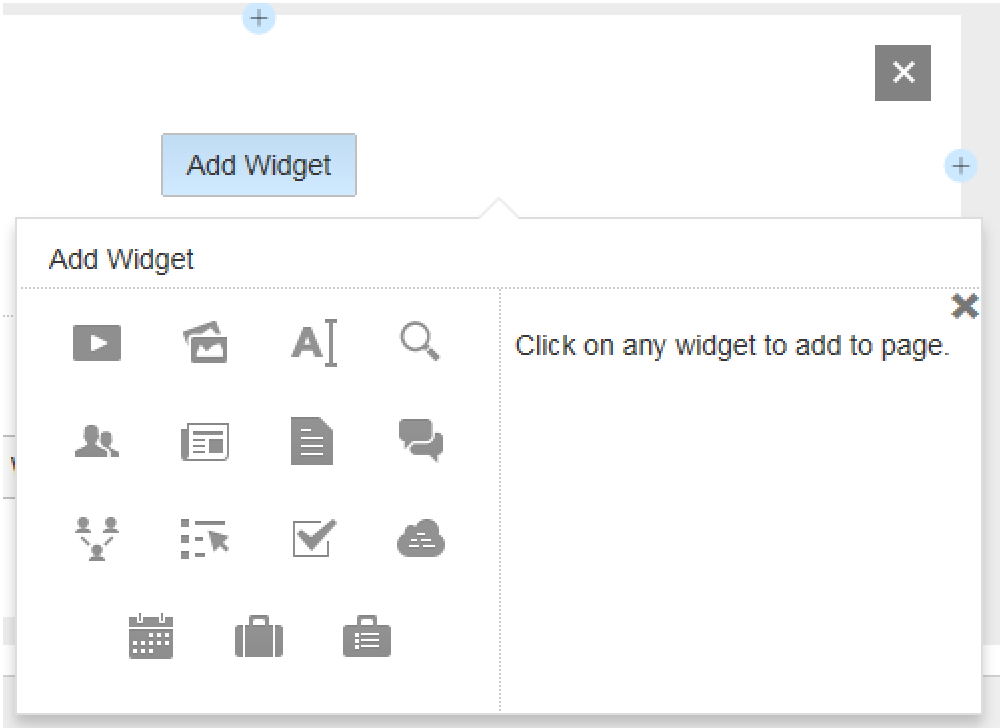
4.1.1 Add a widget when designing a page

To make the most of page designer, it's recommended that you plan your design first by performing an inventory on the types of content and activities that the group members will be working with. Once you have that information, you will be able to add widgets with ease and efficiency. You have the following options for

widgets: video, photo, text, search, people, feed, content, forum, groups, action, task, tag cloud, events, and external business records list.

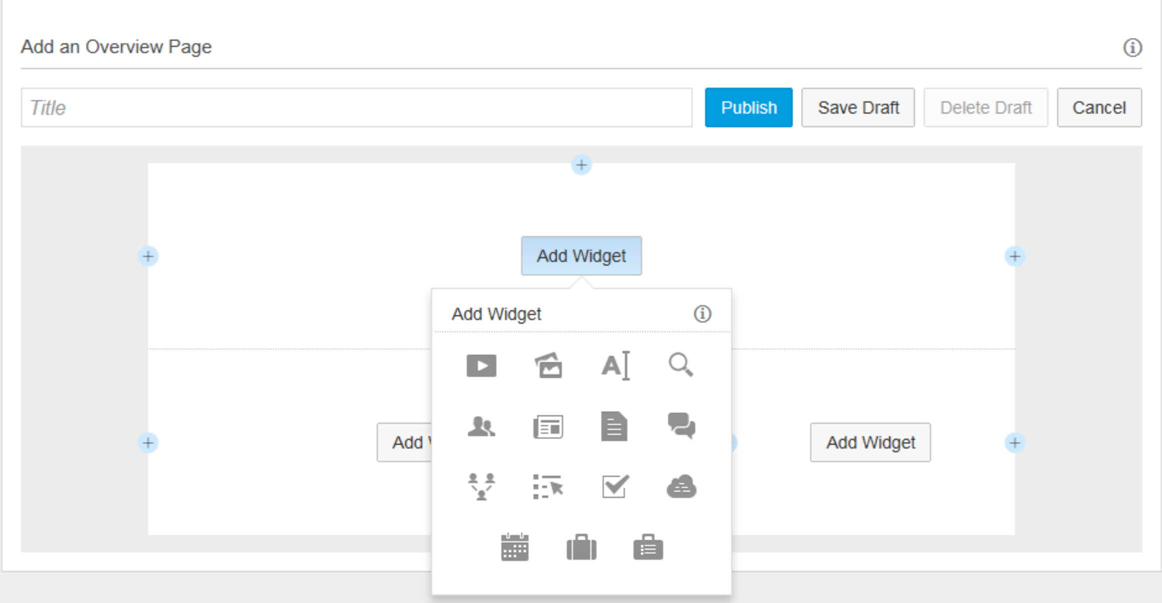
To add any widget to a page

1. Go to the Overview section and select the group page tab.
2. In the page designer view, click *Edit*.
3. Click on *Add Widget*or the +icon to view the pop-up widget menu. As you place your cursor or focus over each widget, you can view information that explains its purpose.



Add widget dialog

4. Click the widget you want to insert on the page.
5. A settings dialog appears for that widget. Enter or select the settings and then click *OK* if available for that widget.
6. Once you've finished working with a widget, click *Save Draft* at the bottom of the page to save your settings.



Save Draft and Publish commands

7. When you have completed all your changes and additions, click *Publish* to make the page accessible to group members.

4.1.2 Action widget

When you insert the action widget, you enable group members to choose from a selection of commonly used action types. They may not be otherwise enabled elsewhere on the group pages, or are used so frequently they they require a dedicated tile to stand out amongst other sections. Only one action widget is allowed per page.

You can set the following details:

- **Widget title**: You can enter a name for the list of actions, or accept the default "Actions".
- **Select actions**: By default, all actions are selected, but you can click the checkbox beside the actions to uncheck the ones that are not relevant for the group. They will not display in the tile. A minimum of one action must be enabled.
- **Configure content destination folders**: The following actions, if selected, require you to specify a destination folder or location in which to place the content. If you don't specify a folder or location then the defaults that display in the dropdown menus for each action will be applied.
  - Ask a Question
  - Add an Idea
  - Add a Discussion
  - Upload a File
  - Record a Video
  - Add a Blog
  - Add a Wiki
  - Add a Task
  - Add a Playlist

> **i Note**
>
> If there is an Actions widget on a group overview page with a form topic action enabled, when the forum type is changed by the group administrator, the forum topic action will be removed from the Actions widget. A notification will sent to the other group administrator(s) when the forum type is changed, affecting the Actions widget. It is up to the group administrator to take corrective action (for example, change the forum type in the Actions widget), if necessary.

4.1.3 Business record widget

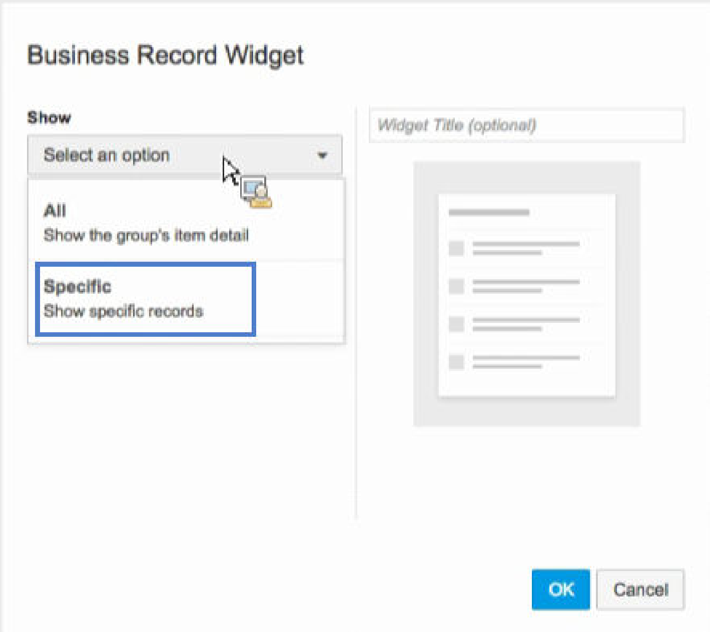
If you have an instance of SAP Jam that is integrated with SAP Cloud for Customer or CRM, you may wish to create groups linked to specific business records and feature those records within the group. This enables higher visibility of a particular record amongst group members. For example, you may have a particular sales opportunity or service ticket which requires the attention of your team members. When you insert a business record widget, you are enabling other group members to view specific details about that account, opportunity, or service ticket business record (e.g., ID, main item name, status, closing date etc.).

> **i Note**
>
> To eliminate confusion on when to use which widget, the business record and business record list widget have been combined into a single widget called "Business record widget" as of the February 2017 release.

You can set the following details for the business record:

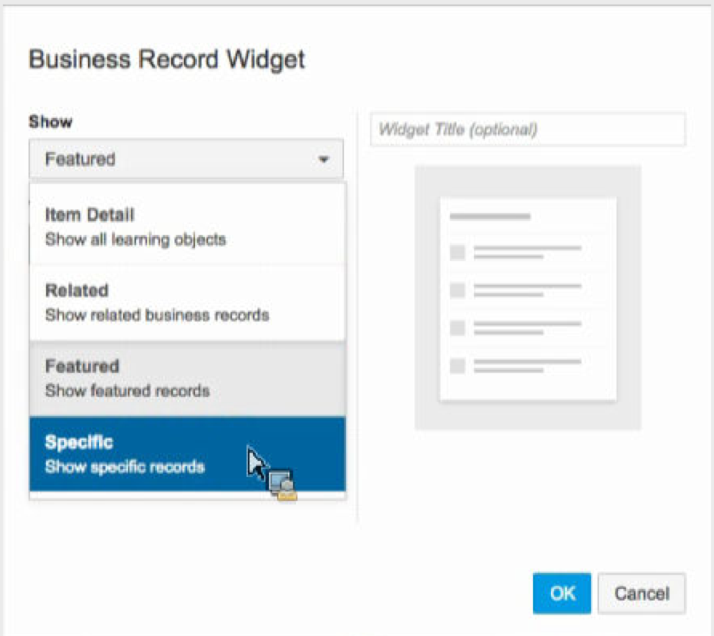
- **Show**: Item Detail, Related records, Featured records, and specific records.

  > **i Note**
  >
  > When customizing a home page or group overview page, company or area administrators and group administrators can select specific business records within the company or group, respectively, when designing pages with business record widgets. For example, when working with Learning type business records, a group administrator can now choose to display specific learning items on their overview page. Show "All" displays a list of records based on a selected type, much like what would appear in the previous business records list widget.

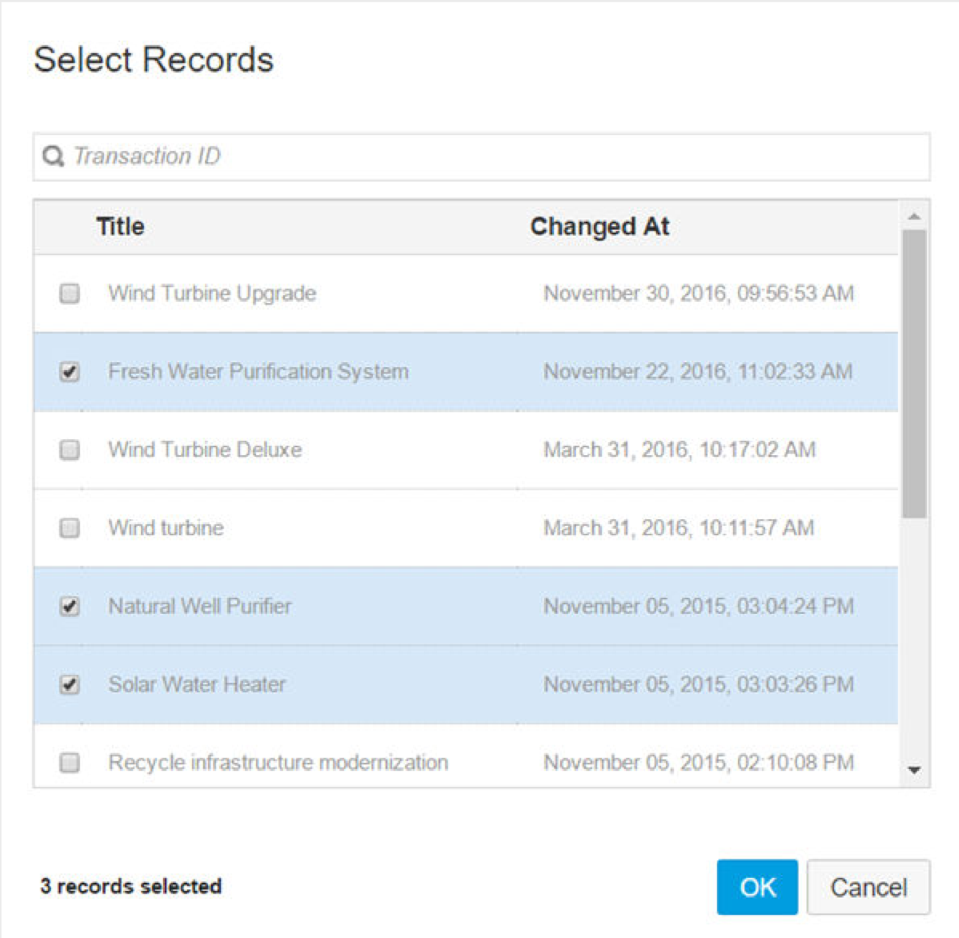


> **i Note**
>
> Show "All" displays a list of records based on a selected type, much like what would appear in the previous business records list widget.

Custom home page design view: Show specific records

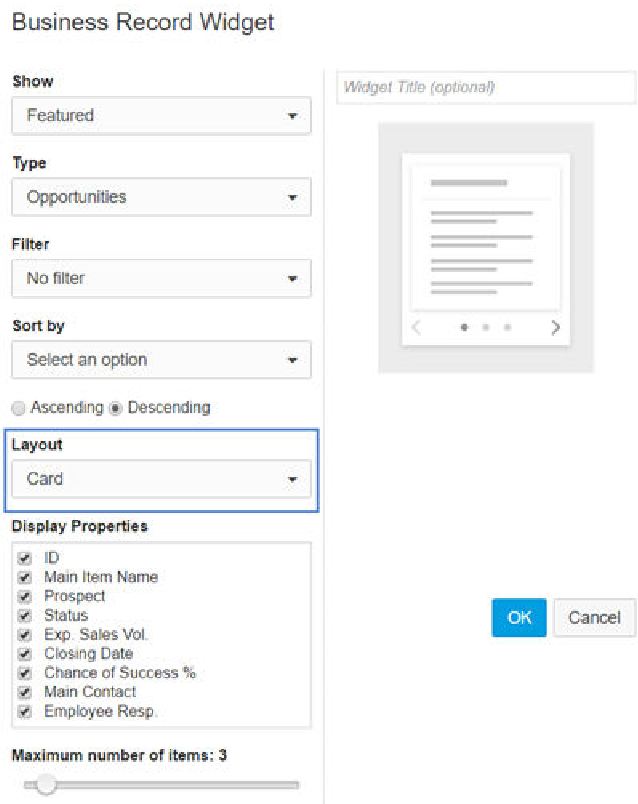


Group overview page design view: Show specific records



Example: Select specific records

- **Display Properties** (appears for Item Detail): List of properties can include Object ID, Industry System, Industry Sector, Rating, Main Contact, Name, Address, Phone, Email Address, and more.
- **Type** (appears for Related, Featured, and Specific): Opportunities, Service Requests, Sales Documents, Quotations
- **Filter** (appears for Related, Featured): Choose from a list of filters
- **Sort by** (appears for Related, Featured): Select an option, and then choose ascending or descending order
- **Select records** (appears for Specific): Multi-select from a list of records
- **Layout** (appears for Featured, Specific): List or Card. If choosing a Card layout, select from a list of display properties (e.g., ID, Main Item Name, Prospect, Status, etc.)



Layout attribute

- **Maximum number of items (appears for Featured)**: 25
- **Title**: Free text

4.1.4 Content widget

When you insert a content widget, you are enabling group members with space for upload, creation, and display of a variety of content.

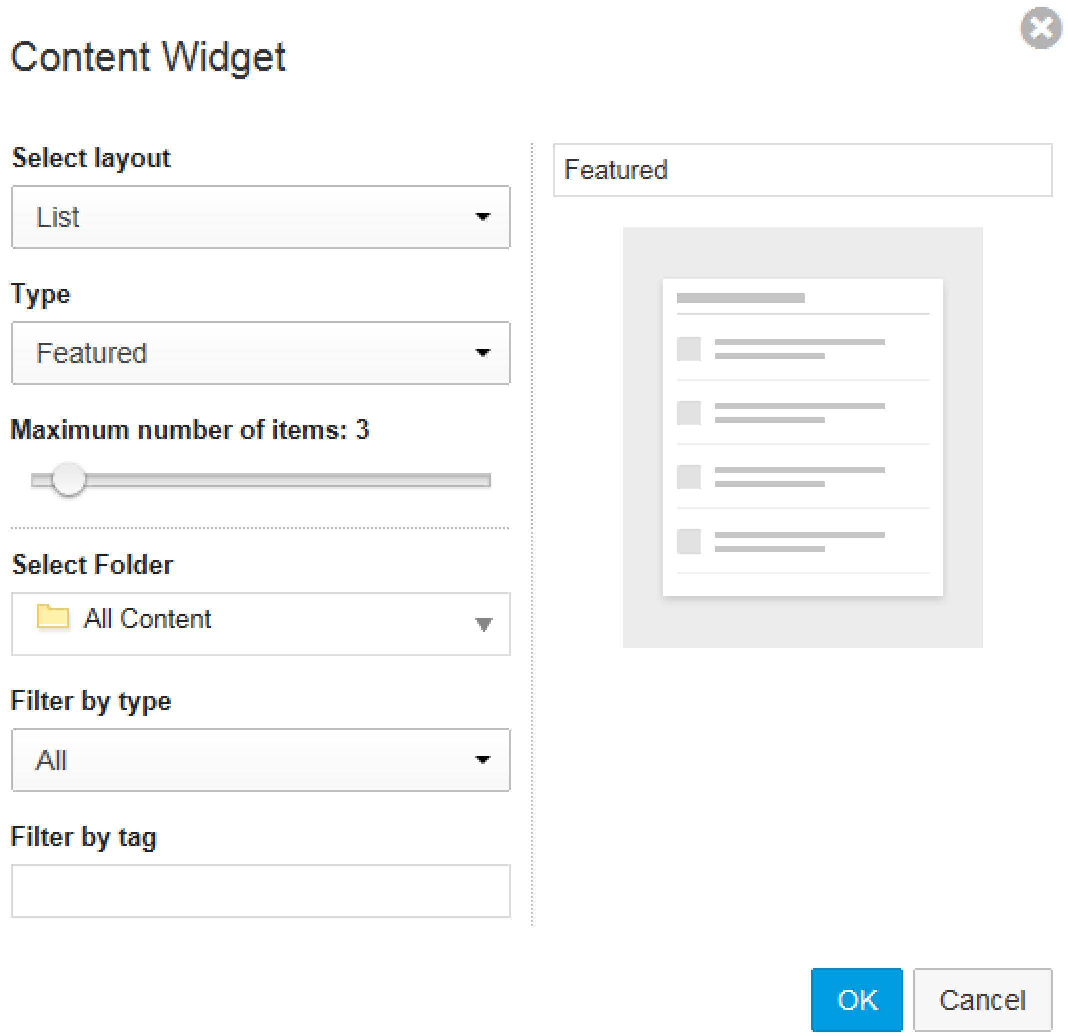
You can set the following details for content presentation:

- **Select layout**: Choose a layout for the content (e.g., list, carousel, gallery, or thumbnail)
- **Type**: Select the criteria that will determine which content displays (e.g., featured, content by title, last updated, most viewed, most replies, most liked, most rated, or highest rated).
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 content items to display.
- **Select folder**: Choose a folder from which you will store and upload your data.
- **Filter by type**: Choose the content type that will display for this widget (e.g., blogs, decision making tools, links, documents, knowledge base articles, photos, planning tools, videos, wikis, and folders). You can select multiple filters, allowing the user to view a mix of content-types in a single widget. If you choose a filter type that has sub-filters (e.g., documents can have sub types of PDFs, Microsoft Word documents or Excel spreadsheets), when you unselect the main filter, the sub filters are also unselected.

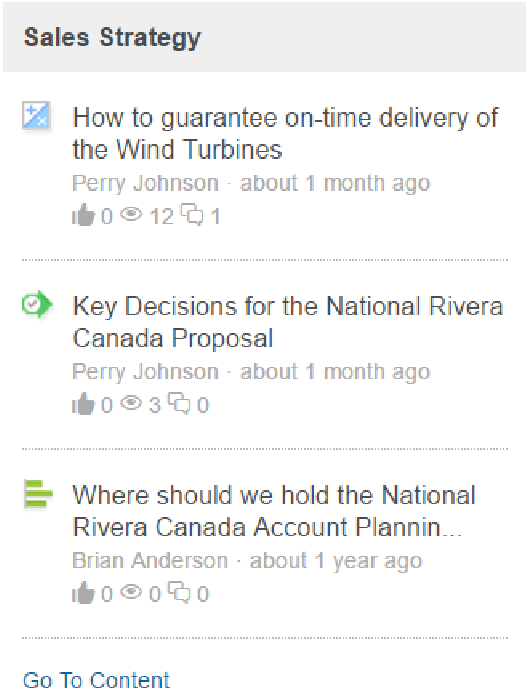
i Note

When filtering by images, thumbnail images will be zoomed in to fill the width of the widget, which is 218 pixels. The image preview height is 122 pixels, with the title, author, and creation time displaying at the bottom of the preview.

- **Filter by tag**: Enter text that refines what appears in the content; one or more tags are allowed, comma-separated.
- **Widget title**: Enter a name for the content or accept the default name provided by the selection in for Type.



Content widget



Example of content widget with top three highest rated content listing, viewed from group overview page

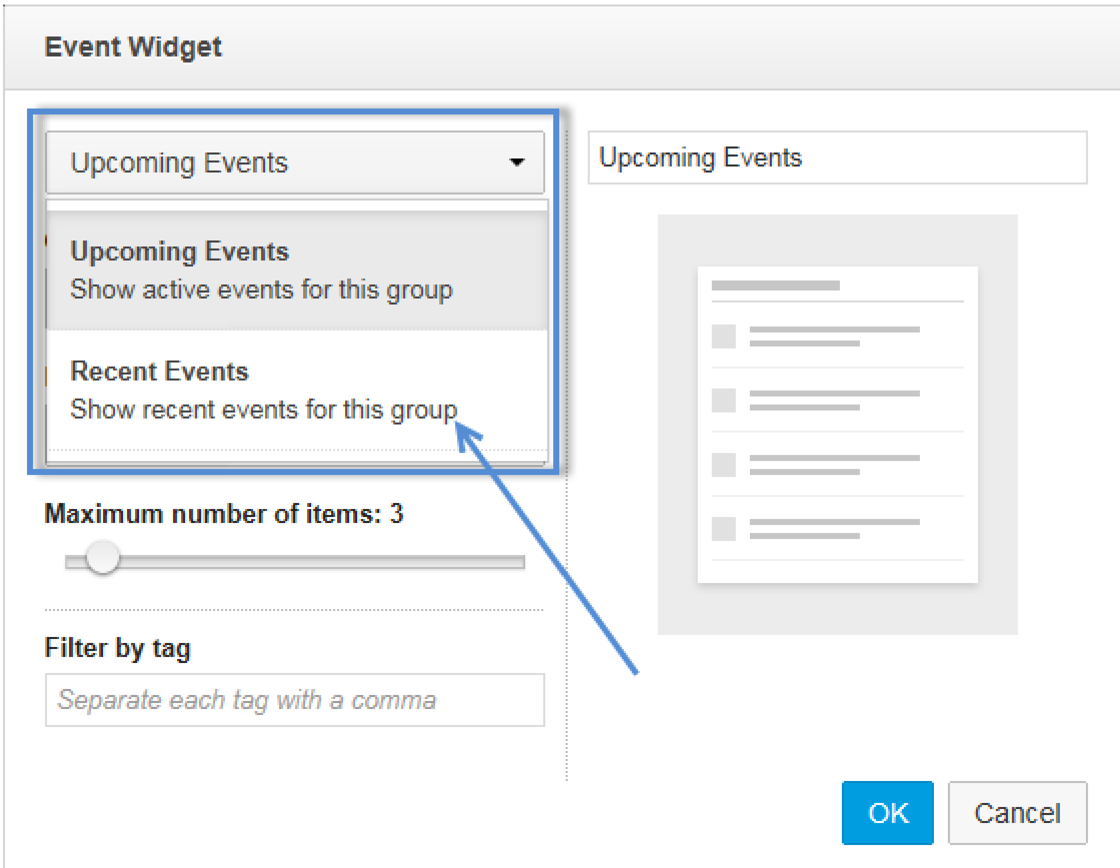
When you hover over the tool tip for the widget in the regular page view, it displays the main filter types that are selected.

4.1.5 Event widget

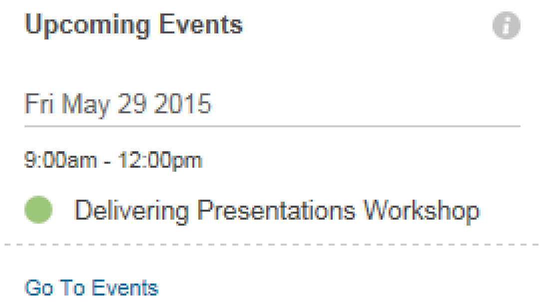
When you insert an event widget, you enable the group member to view a current and recent list of events. A member can also click *Go To Events* near the bottom of the widget to add a new event.

You can set the following details for events:

- **Select group**: Community administrators have the option to select a public group with scheduled events.
- **Event type**: Choose to display upcoming events in ascending order by date or recent events in descending order by date.
- **Category**: Choose a color-coded category to help the group member visually identify the type of event (for example, brainstorm, conference, meeting, milestone, other, social, training, webinar, uncategorized, or custom event).
- **Priority**: Choose to display events of high, normal, low, or all priorities.
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 event items to display.
- **Filter by tag**: Enter text that refines what appears in the events list; one or more tags are allowed, comma-separated.
- **Widget title**: Enter a name for the events list or accept the default name provided by the selection for event type.



Event widget



Example of event widget as viewed on the group overview page

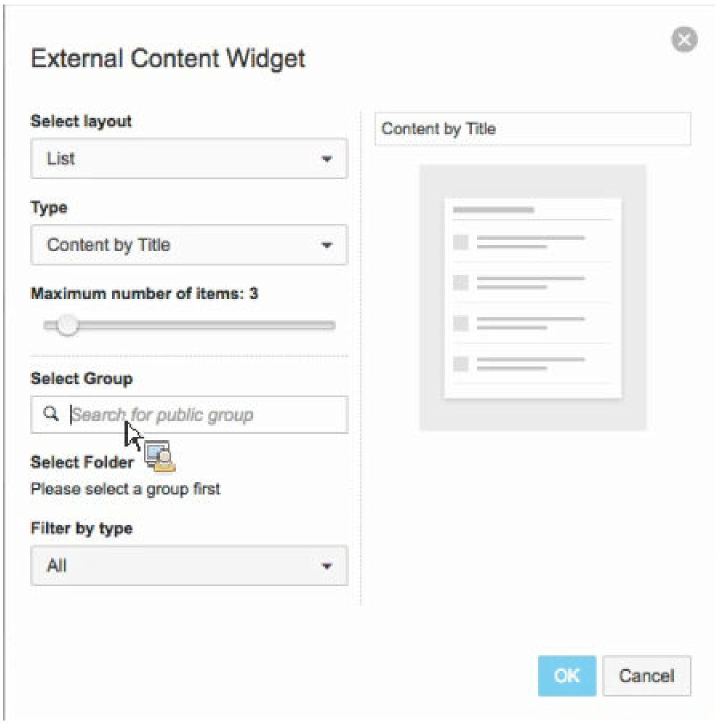
For an event that is scheduled over multiple days, it displays as a single event instead of a separate event for each day it's held.

4.1.6 External content widget

External content from applications such as Microsoft Sharepoint, Office 365 and Google Drive can display in a widget on group overview pages, custom and area home pages.

You can set the following details for external content [page 106]:

- **Select layout** Choose a layout for the content (e.g., list, carousel, gallery, or thumbnail).
- **Type**: Select the criteria that will determine which content displays (e.g., featured, content by title, last updated, most viewed, most replies, or most liked).
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 external content items to display.
- **Select group**: Company and area administrators will have the option to select a public group with external content.
- **Select folder**: Choose a folder from which you will store and upload your data.
- **Filter by type**: Choose the content type that will display for this widget (e.g., PDFs, Microsoft Word documents, Excel spreadsheets, text files). External content from CMIS sources (e.g., Microsoft® SharePoint®, Alfresco® One, OpenText) can include folders.
- **Widget title**: Enter a name for the external content list or accept the default name provided by the selection for event type.



External content widget

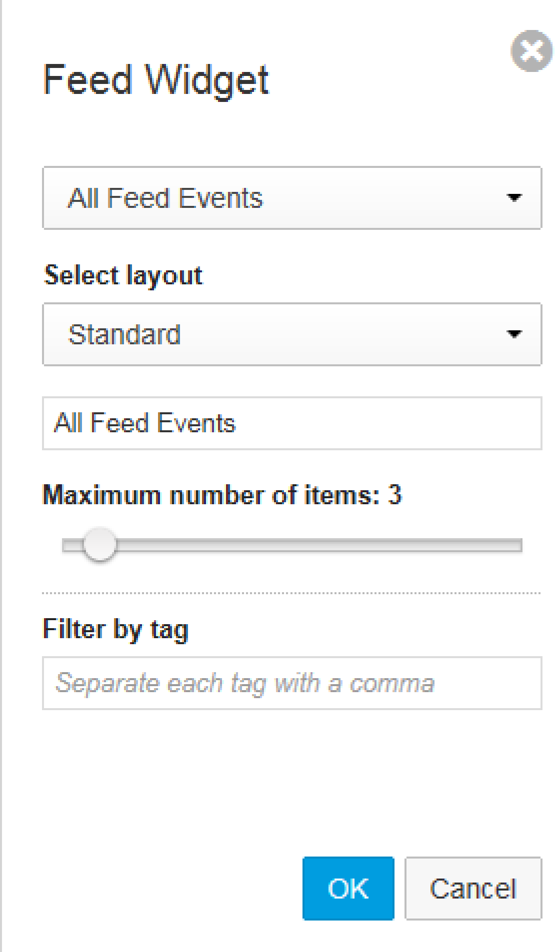
4.1.7 Feed widget

When you insert a feed widget, you are enabling a single display of activities. For example, if you add a feed widget to a page, you cannot add another instance of a feed. However, if you need to add more than one feed for a group, you can add a new feed on a separate page. On group pages and the Overview page, group members can participate in group feed activities by entering, liking, and replying to feed updates.

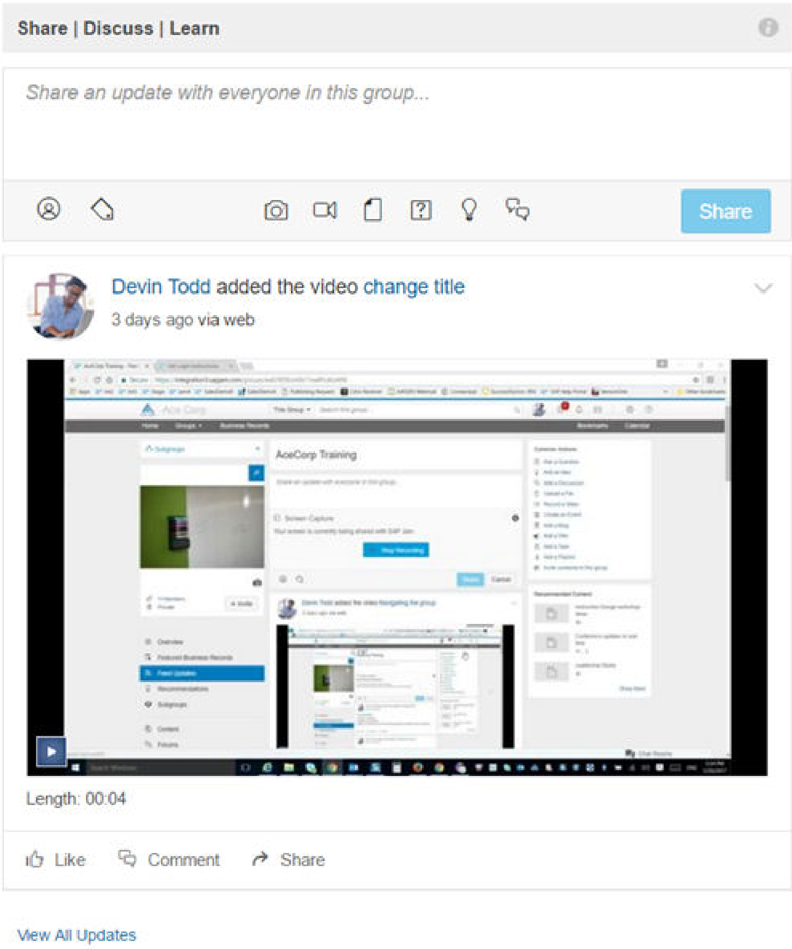
You can set the following details for an activities feed:

- **Select feed type**: You can select the type of activity to appear in the feed (e.g., content updates, forum updates, group status, or all activities).

- **Select layout**: The feed can display with the standard or emphasized font size and appearance.
- **Widget title**: You can enter a name for the feed activity or accept the default name provided in the selection for feed type.
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 feed items to display.
- **Filter by tag**: Enter text that refines what appears in an activity feed; one or more tags are allowed, comma-separated.



Feed widget



Feed widget as viewed from the group overview page

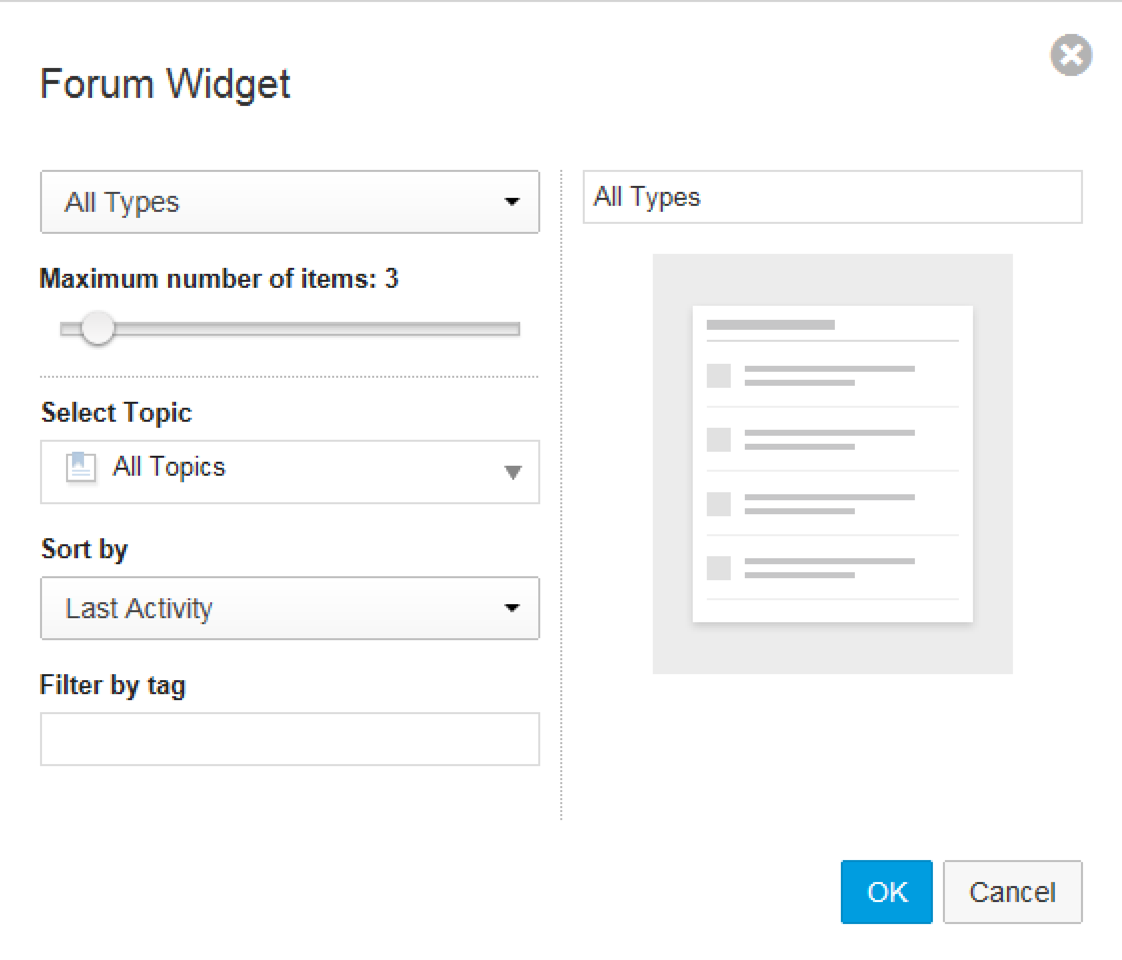
4.1.8 Forum widget

When you insert a forum widget, you enable the group member to view questions, ideas, and discussion submitted by their group.

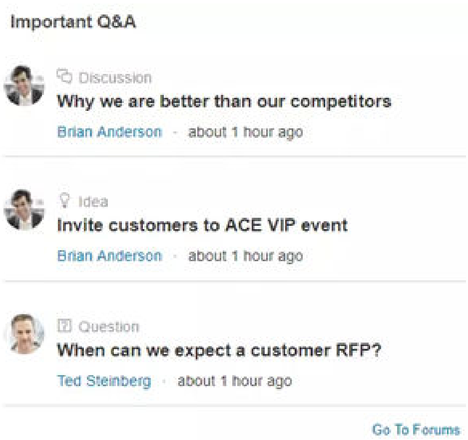
You can set the following details when showing a forum:

- **Forum type**: Choose the type of forum to display (e.g., questions, ideas, discussions, topics, or all types)
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 forum items to display.
- **Select group**: Company and area administrators will have the option to select a public group with forum topics.
- **Select topic**: Choose the drop-down menu that displays to the group member when they want to select which content folder (e.g., general, ideas, questions, or all topics) to place their question, idea, discussion, or topic.
- **Sort by**: Choose how the forum will be organized (e.g., last activity, most replies, most likes or votes, or most viewed).

- **Filter by tag**: Enter text that refines what appears in the forum type; one or more tags are allowed, comma-separated.
- **Widget name**: Enter a name for the forum or accept the default name provided by the selection in for type.



Forum widget



Forum widget on group overview page

4.1.9 Image widget

When you insert an image widget, it allows you to choose an image that can be viewed by a group participant.

There are three options for uploading an image:

- *Drop an image to upload*: You can click and drag an image file from a folder on your computer into the widget space. The minimum acceptable height is 45 pixels.
- *Click here to select an image*: You can click the link to browse for an image file on your computer.
- *Click here to choose an image from this group*: You can click the link to browse for an image that was previously added to the group space.

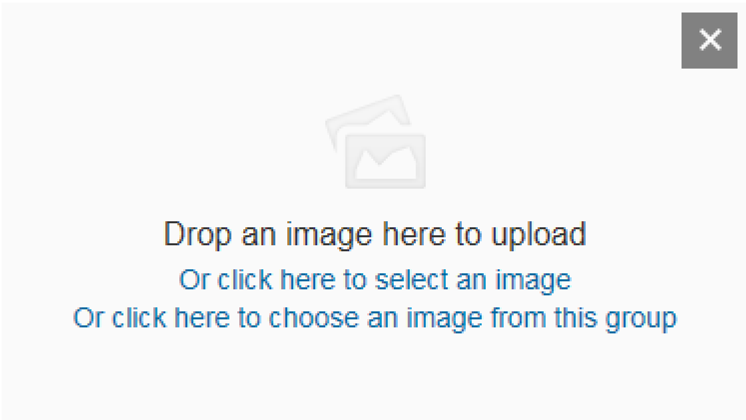


Image widget

Once you add the image, you can click the pencil icon on the image formatting toolbar that appears when you place you cursor over the top right corner of the image. The toolbar includes actions for adjusting the scale, clearing, editing (as in, widget title, image hyperlink, caption, inline or overlay left, center, or right caption placement, and caption background opacity), and removing the image widget.

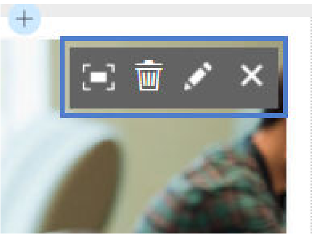


Image formatting toolbar

> **i Note**
>
> Image captions use a white font color. Using a dark colored image to contrast the text works best. If your image is light colored, adjust the opacity of the caption background to achieve the optimal effect.

To easily replace an image within an image widget while preserving its position on the page, you click the *Clear* icon to remove the image rather than clicking the X to delete the widget and then inserting a new widget with a new image

> i Note
>
> By default, small images (as in, more narrow than the column it is placed in) can be scaled to fully fit the column. It can also be centered with whitespace on either side. With centering however, zooming, panning and cropping actions are unavailable.

When you click and drag the bottom edge of an image widget to resize it, a guideline appears to help you align the edge with another image-based widget on the same row. As you drag the guideline, it will automatically snap to the bottom edge alignment matching the other widget.

The image opens within the same page.

Embedded images

Images can be embedded within image, rotating banner, and catalog search widgets. Those images are "bundled" as part of the group overview or custom home page and cannot be searched or browsed for independently.

Content repository images

When your image, rotating banner, or catalog search widget uses an image that already exists in the content repository, and you update that image by uploading a new version, the image is also automatically updated in those widgets.

Image album browser

When images are uploaded to the same Content folder, as you select a single image item to view for a group or via another user's profile wall, album browser actions are enabled to allow you to click through to next and previous images. You can also use the left and right arrows of your keyboard to browse the images.

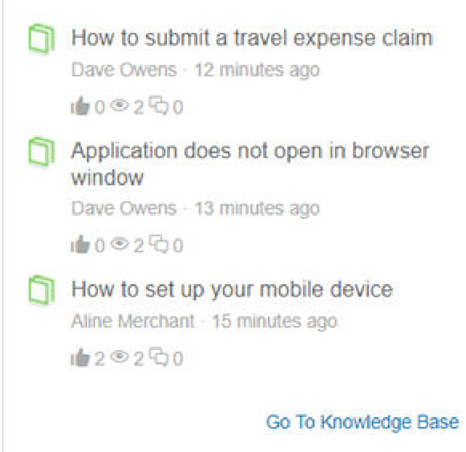
4.1.10 Knowledge base widget

When you add a Knowledge Base widget, knowledge base articles that are available to all group members are shown. You can configure the widget's title, type, number of items to display, and tags.

You can set the following details:

- **Type**: Select the type of knowledge base articles to display (for example, featured, article by type, last updated, most replies, most viewed, most liked, most rated, and highest rated).
- **Select maximum number of items**: You can choose to set a maximum between 1 and 25 articles to display.

- **Filter by category**: Choose one or more categories to filter the list of articles that display.
- **Filter by tag**: Enter text that refines what appears in the list of knowledge base articles; one or more tags are allowed, comma-separated.
- **Widget title**: You can enter a name for the widget, or accept the default (for example, "Featured Articles"). List view layout is currently supported for this widget.

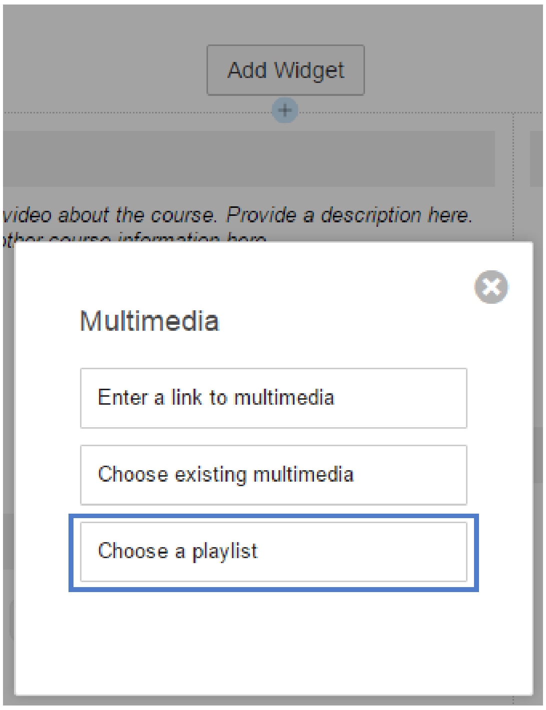


List view layout

4.1.11 Multimedia widget

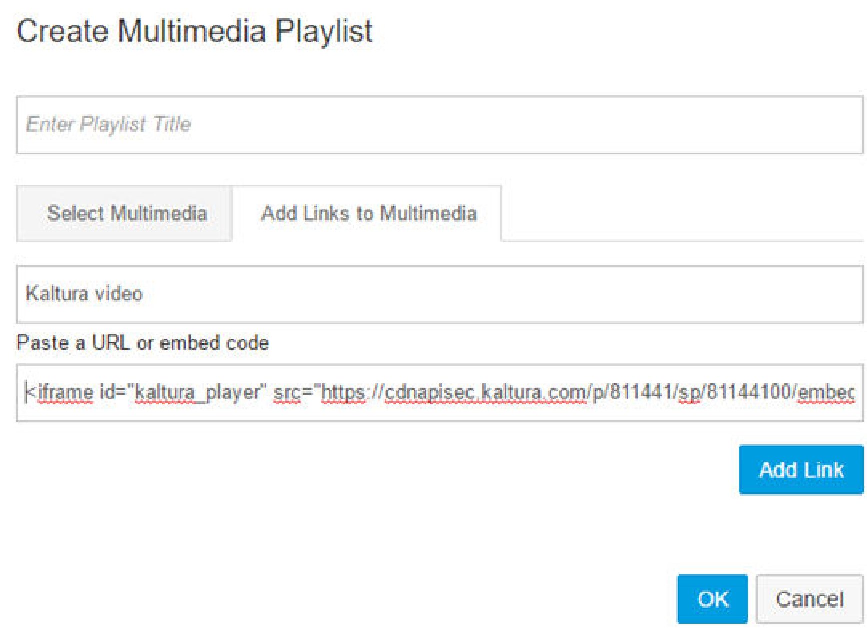
When you insert a multimedia widget, you can copy and paste an link to a video from YouTube, Vimeo, or your group, embed code for Kaltura videos, select an existing multimedia file from the group content folder, or choose an existing playlist. When the group member views the page, they will be able to play the audio, video, or playlist within the same page.

You can also provide a name for the multimedia file or playlist.

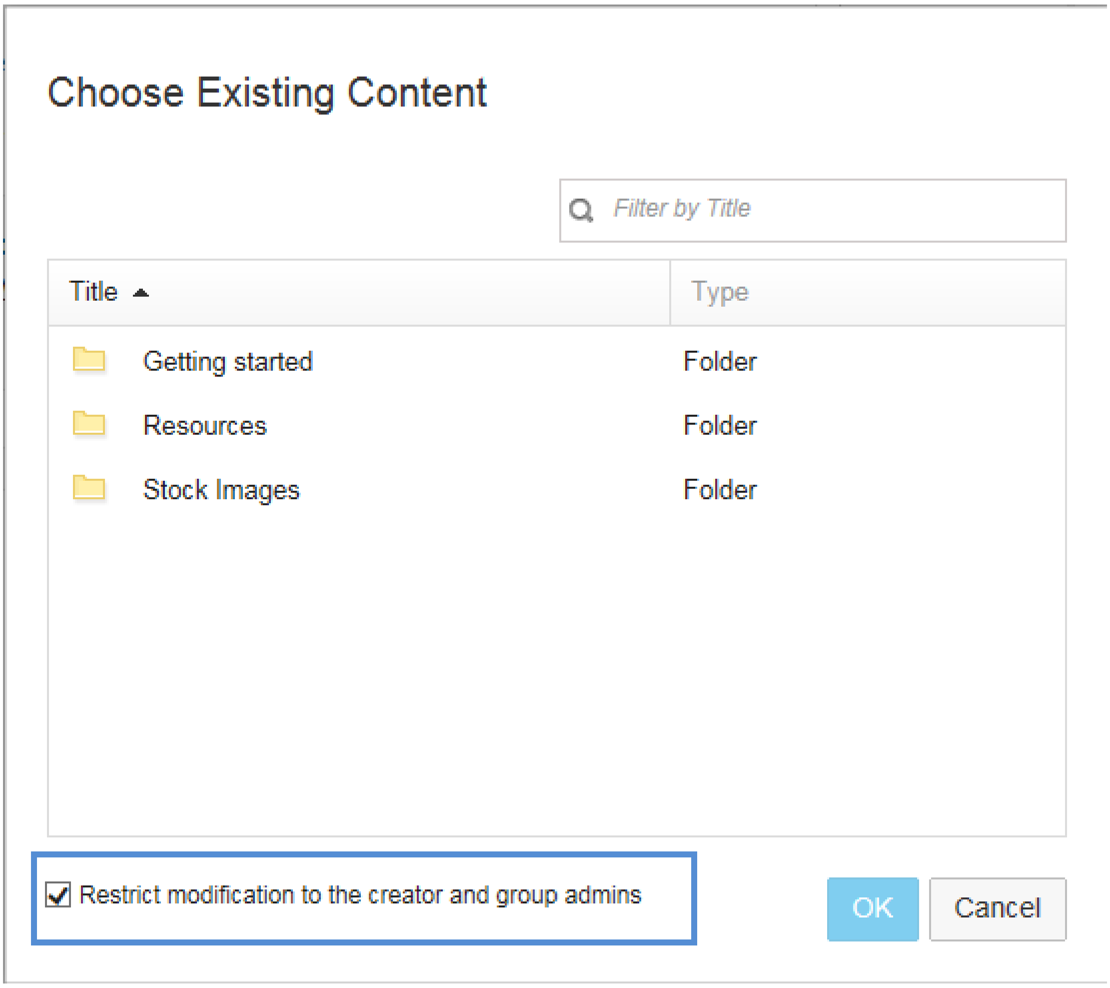


Multimedia playlist

> **i Note**
>
> You can view, select, and search for audio and video files in the main group, but not the subgroup.



Kaltura videos in playlist example



Select existing content from the main group

The "Restrict modification to the creator and group admins" option, when selected, only allows the content owner and group administrator to make changes to the video.

Example of multimedia widget with video as viewed on group overview page

Kaltura videos

To include Kaltura videos on video.sap.com into a playlist, you must click the Share Externally tab and then include the Embed code from the Share Externally tab into the playlist.

> **i Note**
>
> If you use the Embed code from the Share tab, an error message displays recommending that you share the video externally and use the embed code from the Share Externally tab. Direct URLs are not supported.

HTML 5 support

Video playback with HTML5 is supported for Microsoft Edge and non Microsoft Internet Explorer browsers (for example, Mozilla Firefox, Google Chrome, Safari, iOS Safari, Android browser, and Android Chrome). Code embedding for HTML5 videos is supported for wikis and overview pages. Switching videos between high definition and standard definition is supported with HTML5.

4.1.12 People widget

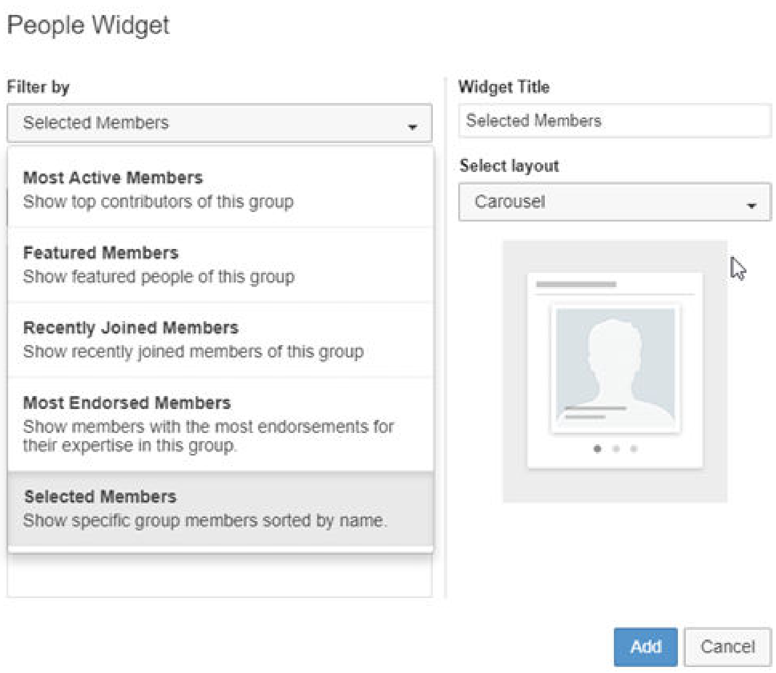
When you insert the people widget, you enable group members to view a photo gallery of other group members based on a specific category or intentional selection.

You can set the following details:

- **Filter by**: Select the list of members to display (for example, most active, featured, recently joined, most endorsed, and selected members). When you filter by featured members, you can sort by name, most recently featured, and most recently joined.

  > i Note
  >
  > If you are designing a custom home page, you select specific users to display.

- **Select layout**: A list displays member photos at the same time. A carousel displays members, one at a time, in a constant rotation.
- **Select maximum number of people**: You can choose to set a maximum between 1 and 25 members to display.
- **Widget title**: You can enter a name for list or carousel, or accept the default (as in, the name of the member list that your previously selected).

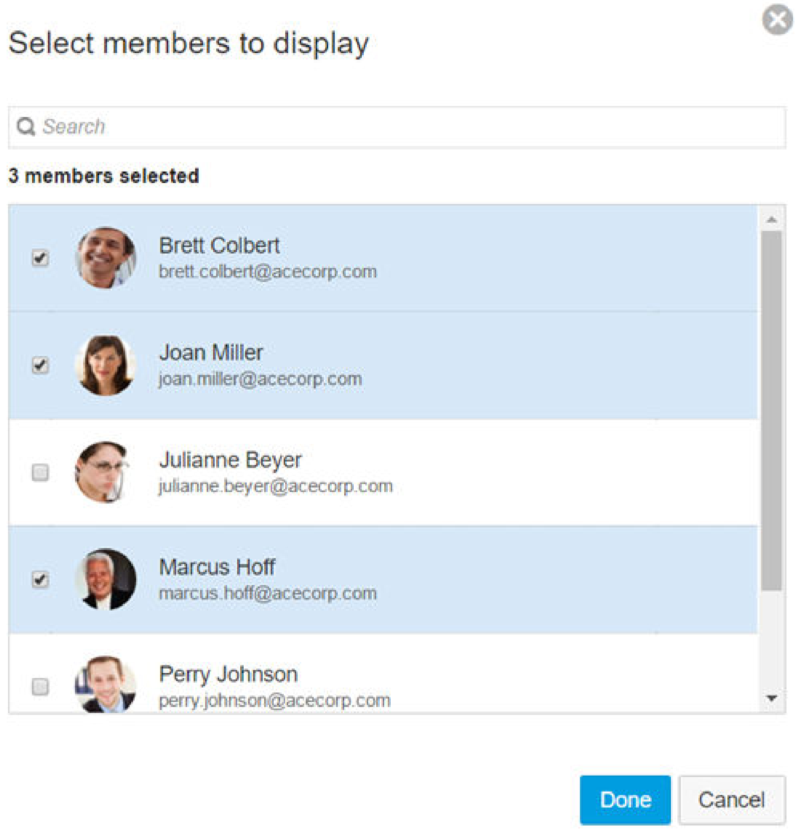


People widget

If you choose to select specific members then

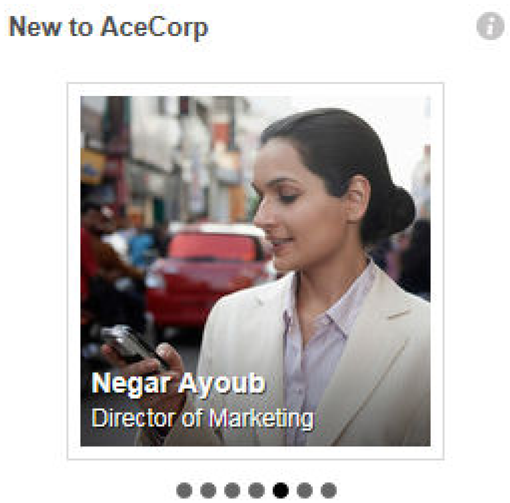
1. From the Filter by dropdown menu, choose *Selected Members*.
2. Click *Select*.
3. To select a member, do any of the following as required:
   - Use the Filter by name or email box to enter the partial or full names of the members.
   - Select up to 25 members from the list.
   - Select or delete individual members from the list.

When you select specific members you can see a list of those you selected while in page design mode. You can drag and drop members to reorder the list of how they appear in the widget.



Select members

4. Click *Done* to save your selection.
5. The list of members you selected will display in the People Widget dialog. If you want to remove them, place your cursor over the row with their name until you can see the X; click it to delete.
   When you choose the "Featured Members" filter, or "Selected Members" filter and you select a member that has been previously featured, the member's name as well as any featured text displays. If the member has not been featured, or they have been featured but without a specific message, then their name and job title displays in the widget.



Example of people widget, carousel style, as viewed from the group overview page

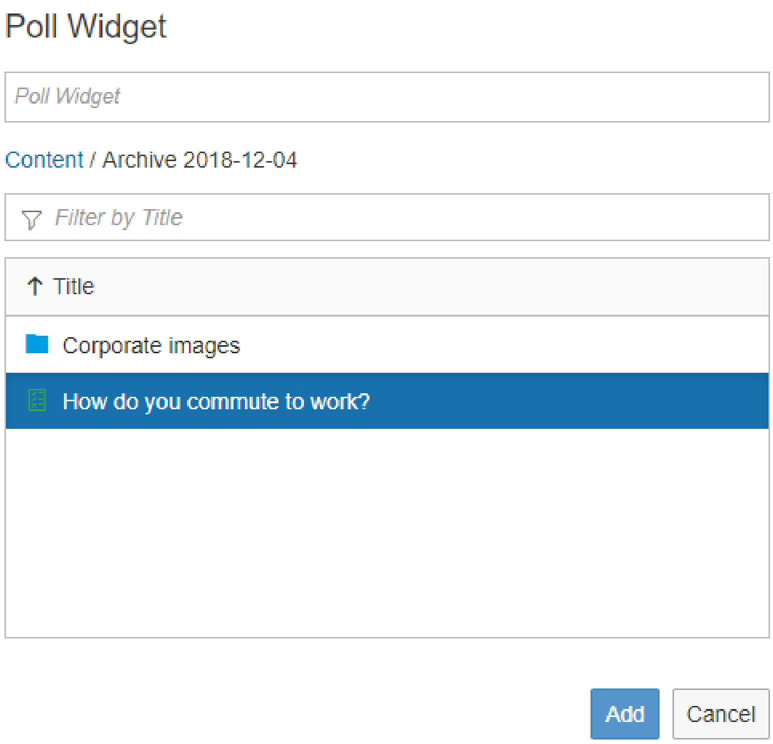
4.1.13 Poll widget

To increase awareness and visibility of a poll, as an administrator, you can add a poll widget to a company, area, or group page that references an existing poll created within the company, area, or group.

Users can add or change their vote, view poll results, and see when a poll is due to close directly within the widget.

To include a poll widget on a home page, area page or group overview page

1. In page designer mode, click *Add Widget*.
2. From the Standard Tools section, select *Poll*.
3. In the Poll Widget dialog, enter a widget title.
4. Select a poll from the content list.
5. Click *Add*.



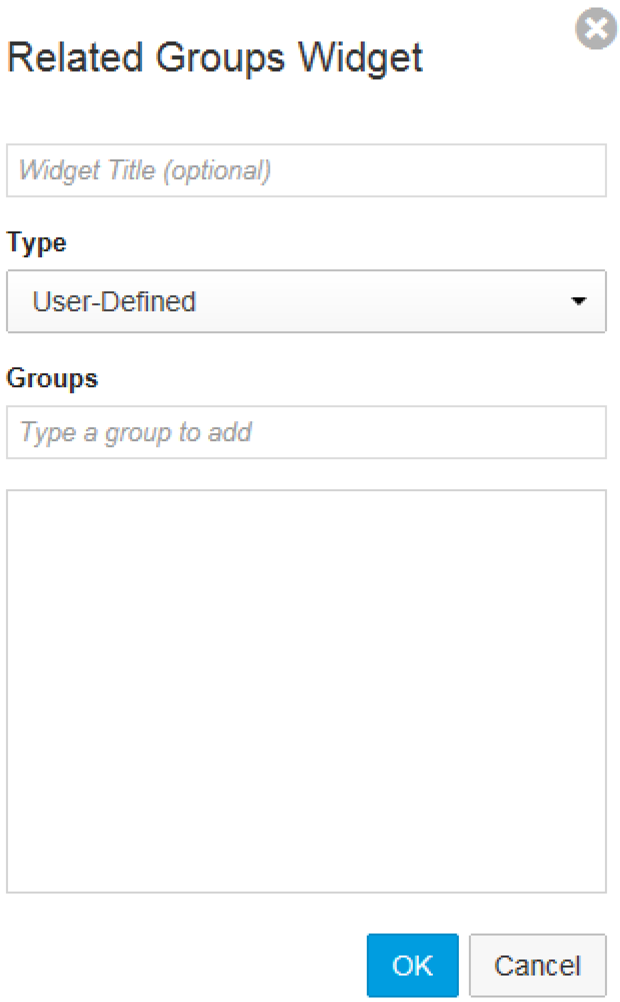
Select a poll for the poll widget

4.1.14 Related groups widget

When you insert a related groups widget, you enable group members to click links to view other groups.

You can set the following details for related groups:

- **Widget title**: Enter a name for the content section or accept the default name provided by the selection in for Type.
- **Type**: Choose to display subgroups that belong to the main group or create a list of groups that you want to show.
- **Groups**: If you've chosen to create a list of groups, enter the group name and click to select each group.



Related groups widget

Example of related groups as viewed on the group overview page

4.1.15 Rotating banner widget

A carousel-style rotating banner widget can be used to display announcements or headlines in a visually prominent way with up to 10 slides contained in a single banner that automatically rotates through the image sequence every few seconds. Users can click "next" and "previous" to move through the slides, or let the slides in the banner automatically advance to the next one in the sequence.

Rotating banner widget

To include a rotating banner widget

1. In edit mode for the page, click the Rotating banner widget icon to open the widget dialog box.
2. With the first slide selected, include an image by using drag and drop, clicking the first link to upload an image, or clicking the second link to select an existing image stored in the home page content folders. Once you include an image, you can zoom in or zoom out using the image scale bar, click and drag the image within the box, and you can click the Center/Scale to Fit button on the top right side to center or scale the image. The minimum height is 270 pixels and the maximum is 500 pixels. For custom home pages, the width size for a
    - 4 column-wide banner is 1180 pixels
    - 3 column-wide banner is 883 pixels
    - 2 column-wide banner is 585 pixels
    - 1 column-wide banner is 288 pixels

> **i Note**
>
> - When added, images are automatically cropped and resized. You can then manually scale each image. As you resize the height for one image, the other slides in the banner will also apply the new image height dimension.
> - For mobile devices and responsive view, the rotating banner widget behaves similar to the image widget where images are scaled to fit the width of the device, preserving the aspect ratio, and without cropping. Any titles or description are also scaled to fit the device width, and truncated where necessary to fit the underlying image.

Example: Scale to fit

> **Note**
>
> We recommend that all images used for a rotating banner widget have the same image dimension (height and width). For example, avoid mixing extremely wide and tall images as that will result in undesirable auto zooming and cropping. Multiple heights and whitespace are not permitted.

3. In the Link content to section, enter a URL hyperlink that will open when the image is clicked, or choose existing content from the home page repository. When you choose existing content, the title of that file will automatically fill the Title field.
4. In the Title field, you can keep it blank, enter new text, or accept the default text based on the previous step.
5. In the Description field, enter some text to describe or accompany the Title. The description will display directly below the title.
6. Choose where you want to place the text:
   - Bottom Left
   - Bottom Right
   - Top Left
   - Top Right
7. On the left side of the panel, click *+ Slide* to add a new slide and repeat the previous steps. The sequential order of slides can be re-arranged using click and drag for each slide.

> **Note**
>
> If you want to delete a slide from the banner rotation, click the x beside the slide on the left.

When you click and drag the bottom edge of an image widget to resize it, a guideline appears to help you align the edge with another image-based widget (for example, image widget for group overview pages and catalog search and rotating banner widgets for custom home pages) on the same row. As you drag the guideline, it will automatically snap to the bottom edge alignment matching the other widget.

In group overview or home page view, an indicator displays to let you know which slide you are viewing in a series. When you click a slide, the link to existing content will open in a dialog box, or a new browser tab for external SAP Jam content.

Embedded images

Images can be embedded within image, rotating banner, and catalog search widgets. Those images are "bundled" as part of the group overview or custom home page and cannot be searched or browsed for independently.

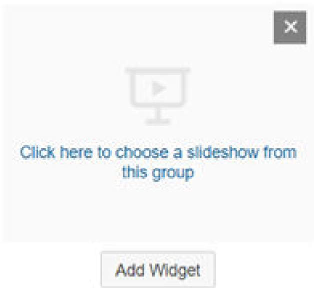
Content repository images

When your image, rotating banner, or catalog search widget uses an image that already exists in the content repository, and you update that image by uploading a new version, the image is also automatically updated in those widgets.

4.1.16 Slideshow widget

The slideshow widget allows page designers to choose one presentation (Microsoft PowerPoint format or PDF file) from the group Content repository to display in the widget. Group members can preview the slideshow within the widget, jumping to specific pages or browsing from slide to slide, before they choose to engage further with it by viewing in a light box view and posting comments.

> **i Note**
>
> If the slideshow is removed, in a folder that you don't have access to, or does not upload completely, you will see a message on the group page indicating that the slideshow is unavailable.



Slide widget

To include a slideshow, click to browse a group content folder for the Microsoft PowerPoint or PDF file. If you want to enter a title for the slideshow widget, after you select the slideshow, hover your cursor to the right of the widget and click the Edit icon. The Widget Title text box displays.

Example of Slide widget on group overview page

4.1.17 Search group widget

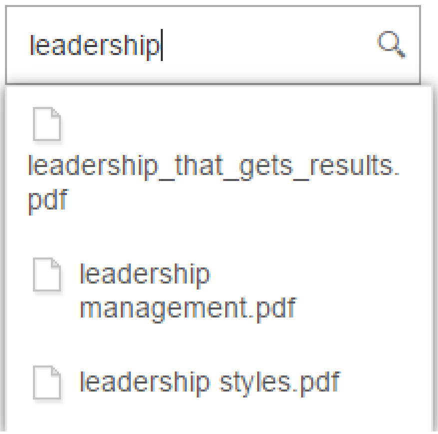
When you insert a search widget, you enable the group member to use a search text box to search the group pages. They can enter their own text, or type a few letters and then choose a suggestion if available from the dropdown list. The list of suggestions that appear in the dropdown list are based on titles or names that match the search criteria. Any other matching search results will appear on a "Search Results" page. Only one search widget is allowed per page.

You can set the following details:

- **Widget title**: Enter a name for the search box, or accept the default "Search".

Search widget

- **Hint text**: Enter text that can help the user when entering criteria.
- **Include border overlay**: You can choose the color, opacity, and thickness for the border.



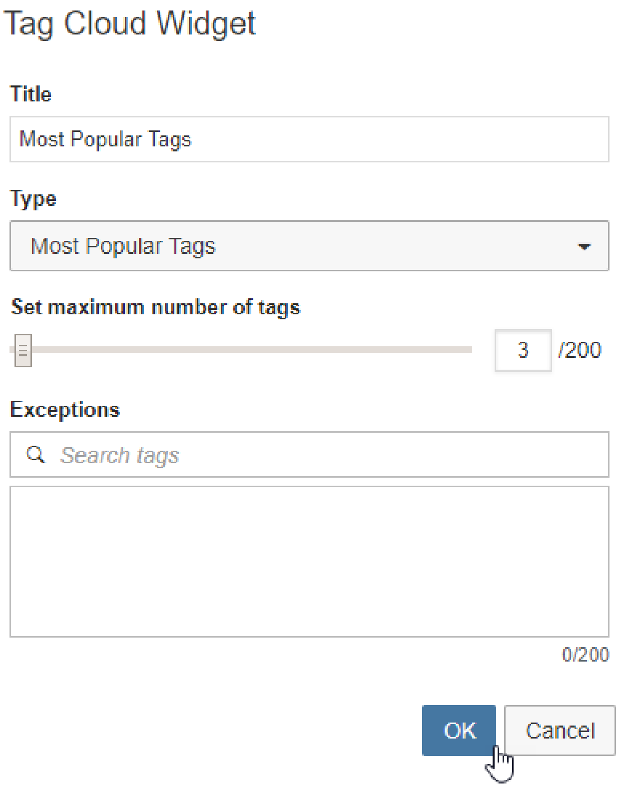
Example of search widget on group overview page, with matching results in dropdown list

4.1.18 Tag cloud widget

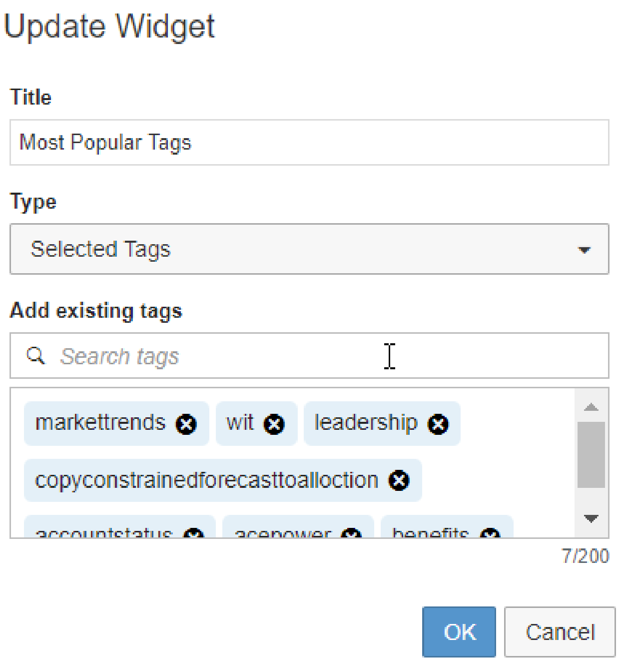
When you insert a tag could widget, you enable group members to view the most popular tags used by and within their group. The most popular tags will display in a larger font size.

You can set the following details for the tag cloud:

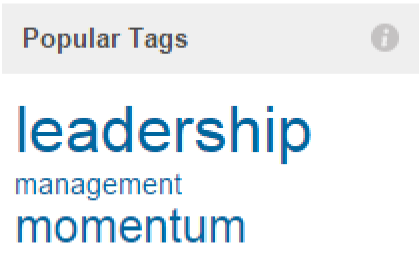
- *Widget title*: Enter a name for the cloud or accept the default name, "Popular Tags".
- *Type*: Choose "Selected Tags" when you want to limit the tag cloud widget's display of tags based on a specific selection of up to 200 tags. Choose "Most Popular Tags" from when you want to also exclude specific tags from the set.
- *Maximum number of items*: Click and drag the scale slider to set a maximum between 1 and 200 tags to display when you select "Most Popular Tags".



Tag cloud widget with most popular tags

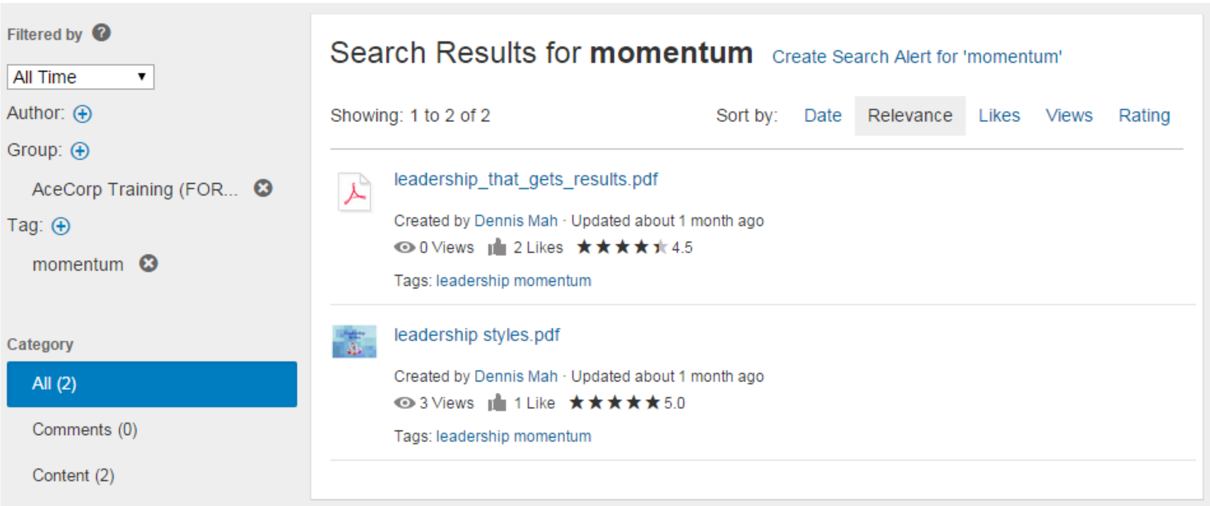


Selected tags in tag cloud widget



Example of tag cloud widget with three popular tags displayed on the group overview page

On the page view, the widget displays with an information icon. When you place your cursor over it, it shows the maximum number of popular tags that can display. As you hover over the tags, the number of times the tag has been used will appear. By clicking on the tag, a list of search results will display to show the items using that tag.



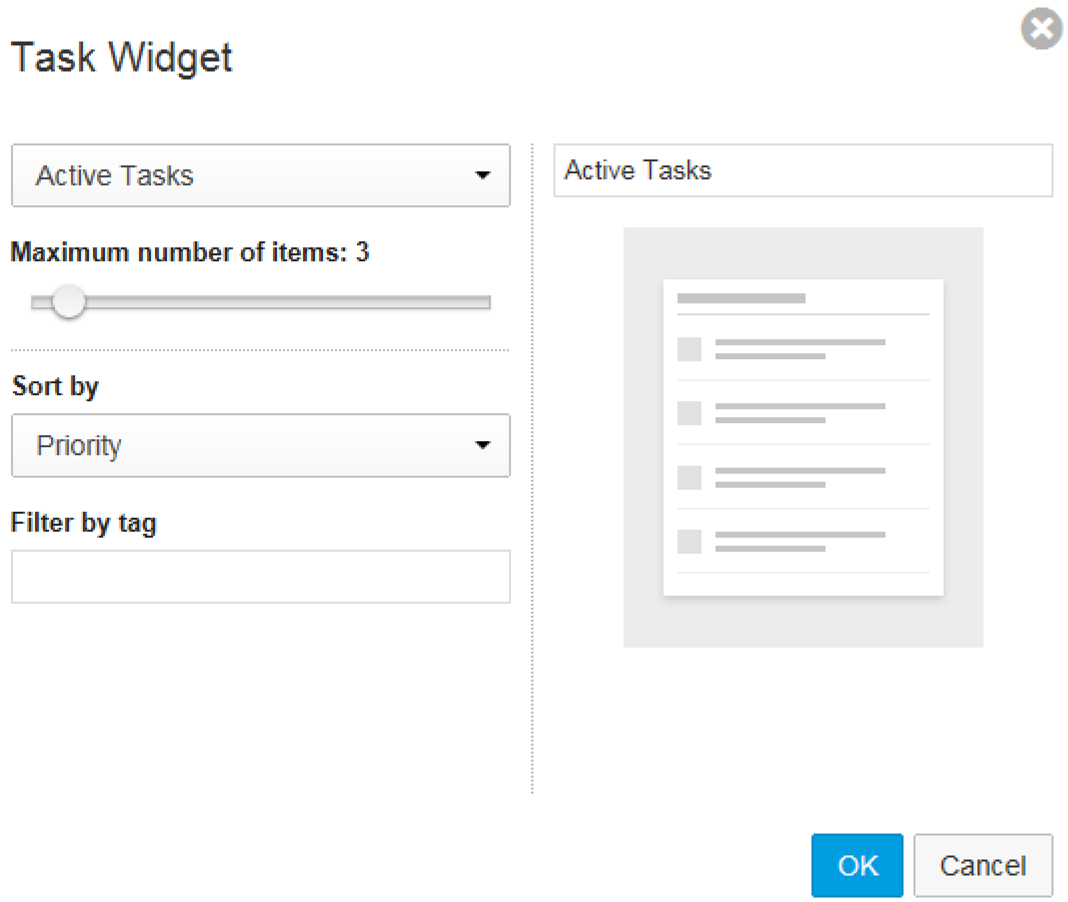
Example of tag search results

4.1.19 Task widget

When you insert a task widget, you enable group members to view the status of various group tasks. These can include tasks of varying priorities and even tasks that are overdue. While tasks can be accessed through group navigation, including a task widget on an overview page draws more attention to important activities.

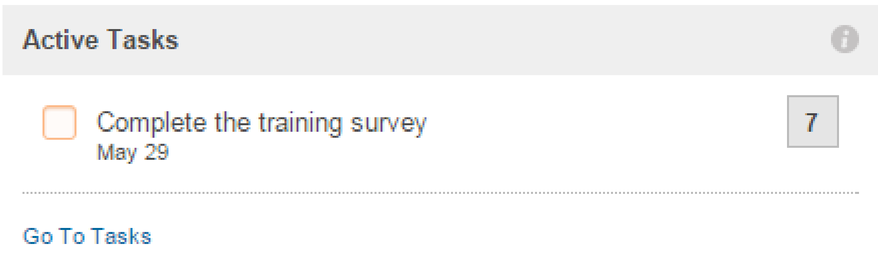
You can set the following details for task activities:

- **Task type**: Choose from active, completed, overdue, and all group tasks.
- **Maximum number of items**: Click and drag the scale slider to set a maximum between 1 and 25 task items to display.
- **Sort by**: Choose to display tasks by priority, due date, or last updated.
- **Filter by tag**: Enter text that refines what appears in the task activity list; one or more tags are allowed, comma-separated.
- **Widget title**: Enter a name for the task list or accept the default name provided by the selection in for type.



Task widget

On the page view, tasks can display with the name of the task, due date, and number of people assigned to the task. To view the task, group members can click on the task.



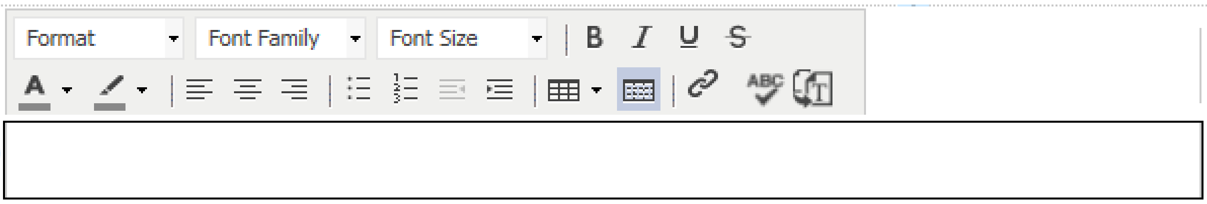
Example of task widget on group overview page

4.1.20 Text widget

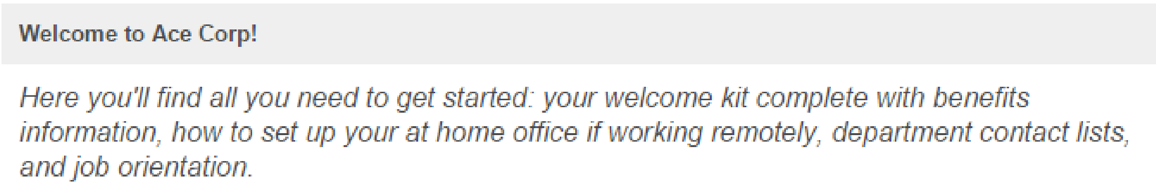
When you insert a text widget, a text editor displays where you can enter content such as text, lists, simple tables, and URL links. A formatting table is available for you to select fonts, colors, spell check, and other commonly used features for text editing. Entering a text name for the widget is optional; click the pencil icon that appears when you hover the cursor over the right side of the text box.

You can also copy and paste content from other sources into this text editor.

> **i Note**
>
> While you can copy and paste images from external resources or web pages, some users may not be able to see these images. If you upload those images to the group, this ensures that all group members have visibility.



Text widget



Example of text widget with title as viewed on group overview page

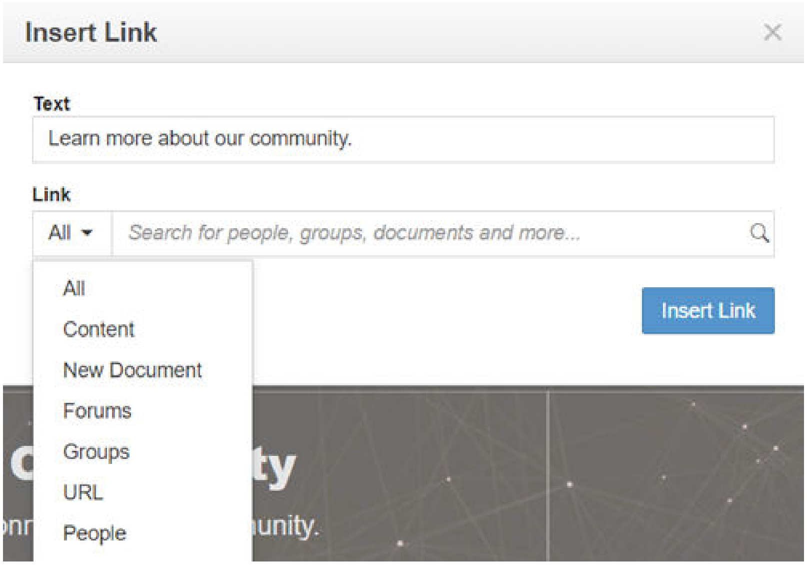
Hyperlinking images

If you are using the text widget as a means of creating hyperlinked images, please note that the Text field in the URL tool is currently disabled for images. While you can insert a hyperlink, the text that appears when you hover over the image will say "Image" by default.

Insert links

From the rich text toolbar, you can choose *Insert Link* and enter text that you want to hyperlink to any of the following:

- People, groups, or documents
- A new document
- Other content
- A forum topic
- URL



Insert link

4.2 Conversion for deprecated widgets

Dynamic widgets for wiki pages and blogs posts are in the midst of deprecation. Group administrators will have the option to convert wiki pages and blog posts that use these widgets into group overview pages.

As a group administrator, you can click *Convert* to automatically convert a wiki page or blog post with one or more previously deprecated dynamic widgets to a new group overview page that is appended at the end (last tab on the right) of all other group overview pages. This allows for easier overview page maintenance and better rendering on mobile devices. After the conversion, you have the opportunity to edit the layout before publishing the new overview page, which will also have a new URL. You can then manually delete the wiki page or blog post.

> **i Note**
>
> Metadata for the wiki page or blog post such as description, tags, followers, thumbnails, and comments are not supported.

5 Member lists

5.1 Create and manage member lists

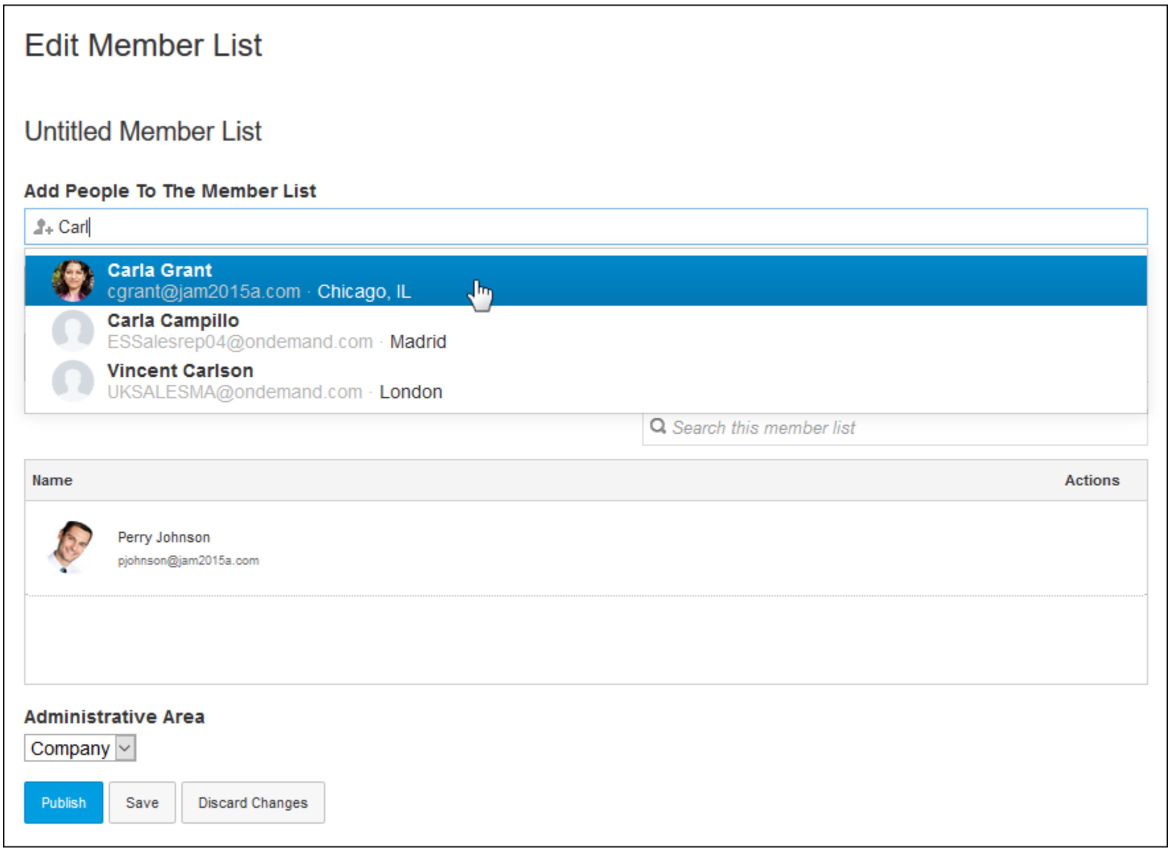
Company administrators can use the *Users and Member Lists* page to create, edit, publish, or delete member lists. This function is not available to group administrators. **The instructions below are intended for use by company administrators as included in the SAP Jam Administrator Guide, and for information purposes only for group administrators as included in the SAP Jam Group Administration Guide**.

When working with groups especially in medium to large sized organizations, it may become difficult to recognize who should be invited to a group. Published member lists can offer a means to save time in inviting users one by one. Company administrators can add existing SAP Jam users, import another member list, paste a list of comma-separated email addresses or import a CSV file with comma separated email addresses.

> **i Note**
>
> - Groups that contain member lists cannot be moved to subgroups.
> - Groups members who were added via a list cannot choose to leave a group, however they can unfollow the group feed as an alternative.
> - For the November 2016 release, Auto groups will be converted to regular groups. If they use profile-based rules, then those rules will be applied to a corresponding dynamic member list.

Create a member list

1. Go to the Admin console and select *Users* > *Users and Member Lists* from the left side navigation.
   The *Users and Member Lists* page displays.
2. Select the *Member Lists* tab, and click *Create New Member List*.
   The *Edit Member List* page displays.



Create a new member list

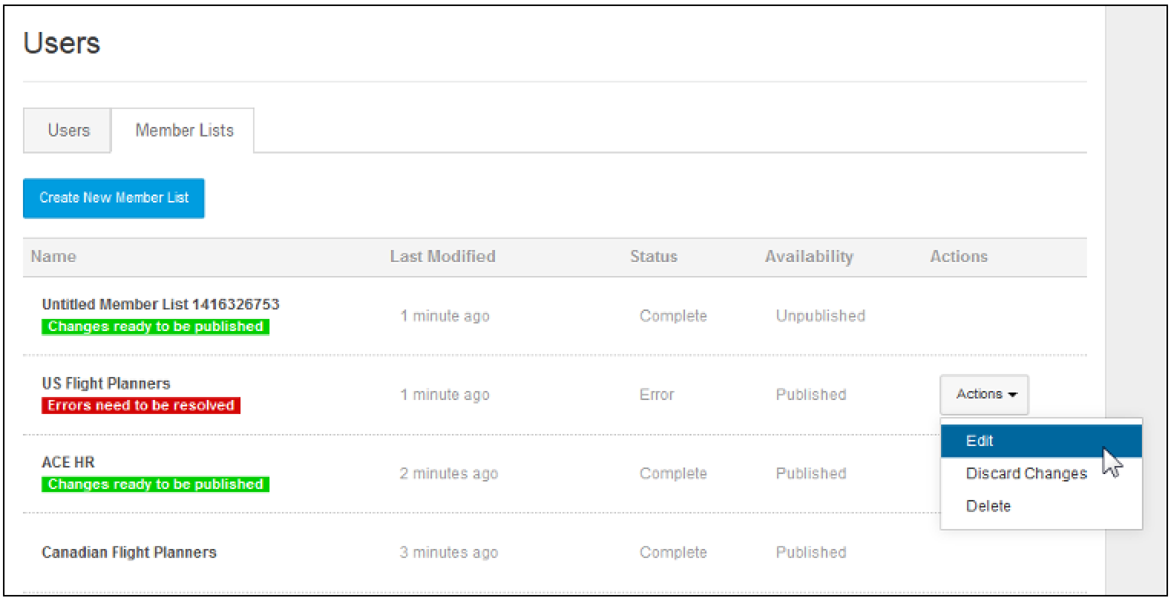
3. Click the auto-generated title (*Untitled Member List*) and enter a meaningful name for the member list.
4. In the *Add People to the Member List* text box, build your member list by using one of the following methods:
   - Type a user's name into the *Add People to the Member List* text box, and—when the person you are looking for appears in the drop-down auto-completion list—click on their information to add them to the *Pending Members* table.
   - Paste in a comma-separated list of email addresses into the *Add People to the Member List* text box, and press *Enter* to add all of the listed users to the *Pending Members* table.
   - Type the name of another member list into the *Add People to the Member List* text box, and press *Enter*, and press *Enter* to add all of the listed users to the *Pending Members* table.
   - Click *Import CSV* to import a comma-separated list of email addresses for members, and use your browser's upload feature to find and select the file on your hard drive. When the file is uploaded and processed, the listed users will be added to the *Pending Members* table.

   If you add an unknown email address, it will be placed in the *Errors* tab. You can save a Member List that has errors, but you cannot publish it until you have corrected the unrecognized email addresses.
5. To edit or remove users from your Member List, hover your mouse over a row of member information in any of the three listed members tabs (*Pending Members*, *Published Members*, or *Errors*) and/or click the *Actions* button to see the actions available for that member. The actions are either *Remove* (available in all three tabs) or *Edit* (only available in the *Errors* tab.

i Note

When an individual member is added to or removed from a member list, those changes will be immediately applied to any group, subgroup, or private folder that uses that member list.

6. Optionally, click *Publish* if you are satisfied with the list of members in the list, there are no errors, and you want to make the member list available for use.
   All users are moved into the *Published Members* tab.
7. Optionally, click *Save* to retain a list that you are not ready to make available for use.
   You are returned to the *Member List* tab of the *Users* > *Users and Member Lists* page.



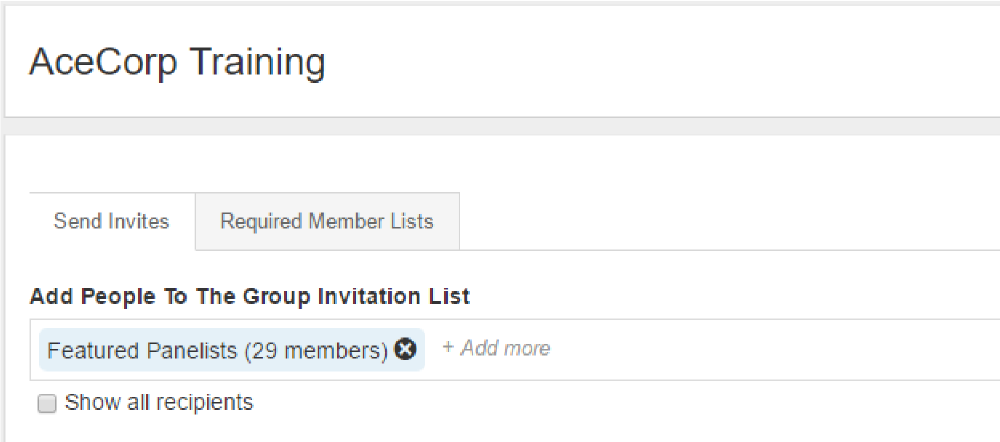
Member lists catalog

The Member Lists shown in the catalog will show one of the following *Status* and *Availability* combinations, which will allow you to take the actions listed in the indicated options of the *Actions* drop-down menu:
- *Complete* and *Published*: You can *Edit* or *Delete* the list.
- *Complete* and *Unpublished*: You can *Edit*, *Publish Changes*, *Discard Changes*, or *Delete* the list.
- *Error* and either *Published* or *Unpublished*: You can *Edit*, *Discard Changes*, or *Delete* the list.
8. In the *Edit Member List* page you can do the following:
   - To edit a member list
   - To publish a member list
   - To delete a member list
   - To discard an unsaved list, click *Discard Changes*.

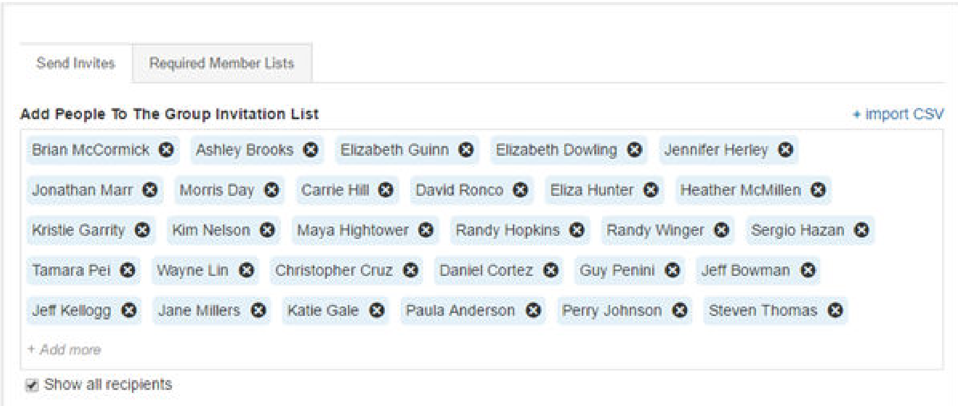
Invite users to a group via a member list

Once Member Lists have been published they are available to be used to invite large numbers of users to a group all at one time. Click the *Required Member Lists* tab on the Invite page, and then type the name of the Member List in the *Add Required Member Lists to this group* text box.

If you want to view all recipient names for the dynamic member list, select *Show all recipients* or double-click individual names. To remove a recipient from the invitation list, click the *X* to the right of their names.



Send invites to a dynamic list



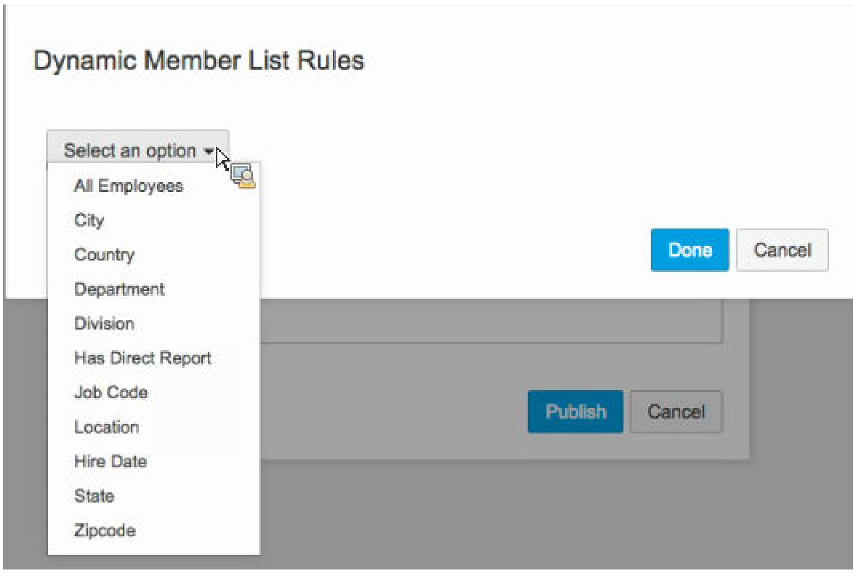
Show all recipients on main group invite

i Note

Under the members list for a group, group administrators can filter by alumni users only, click **Select All** to select multiple alumni users and then click **Remove Alumni** to bulk remove those users from the member list.

Profile-based dynamic member lists

When a company administrator creates a dynamic member list, they can apply profile rules to that list.



Example: Select one or more profile fields from the Options drop-down menu to create the rule

When profile changes occur that impacts a member list based on a particular profile rule (e.g., a specific job location serves as the membership rule, and a member no longer belongs to that location; someone new has joined the same job location), the member list will be updated to include or exclude members per the rule. Groups that use the member list will also automatically update to reflect the change in members (e.g., per the previous example, the member who no longer has the same job location is removed from the group).

i Note

Automatic updates for larger member lists may take more time to propagate back to groups that use the member list.

Main groups and subgroups

You can add any member list belonging to a main group also to a subgroup by clicking the *Required Member Lists* tab on the subgroup's Invite page, and then typing the name of the member list. The members of the member list are automatically added to the subgroup and have the same ability to interact with the subgroup as other non-member list added group members (e.g., selecting specific members from a member list and adding them to private folders).

When an entire member list is removed from a main group, it will also be removed from any private folders and subgroups.

Private content folders

when you assign a member list to a main group, its subgroups can also use the same member list. When you add private folders to the main group or subgroup, you can also share access to those folders with the member lists that are already assigned to the main group and subgroups.

In the main content section listing or the content view of the selected private folder, a group administrator can click the *Edit* icon on the right corner to view the list of who has access to the folder, remove access from a member list or member, and give access to a member list or member.

A group member can view a list of member lists and other members who also have access to the private folder.

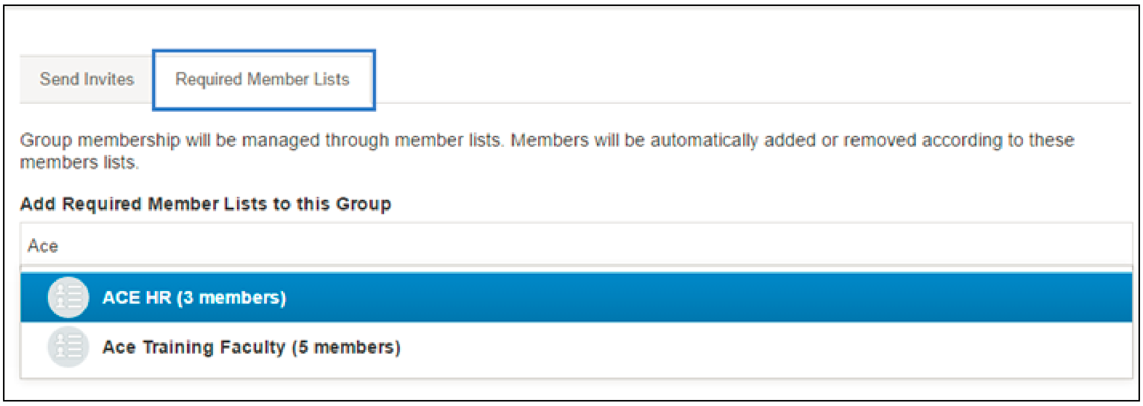
When an entire member list is removed from a main group, it will also be removed from any private folders and subgroups.

5.1.1 Assign users to a group via a member list

Once member lists have been published they are available to be used to assign large numbers of users to a group all at one time. Click the *Required Member Lists* tab on the *Invite* page, and then type the name of the member list in the *Add Required Member Lists to this group* text box.

If you **assign** a member list to a group, all users on the member list are assigned to this group. If you have set up a a user agreement (*terms of use*) for the group the users have to accept the terms of use before they can access the group. Assigned members do not have the option to leave the group. You can use this feature, for example, for groups that are designed to broadcast required information to specific parts of your organization, such as departments or specialist groups.

> i Note
>
> Both manually created Member Lists and Dynamic Member Lists are available by using this method.



Using member lists in invitations

> i Note
>
> Under the members list for a group, group administrators can filter by alumni users only, click **Select All** to select multiple alumni users and then click **Remove Alumni** to bulk remove those users from the member list.

> i Note
>
> If a required member list is changed after you saved the assignment, for example if users are deleted or added to the member list by the company administrator, this also updates their workspace membership, this means the members are removed from or assigned to the workspace.

Enable silent assignments

If you do not want that a notification is send to each user on a required member list that you assign to a group, you can enable silent assignments in the group settings:

1. In the group, click *Group Admin > Edit Group*. The *Edit Group* page appears, defaulting to the *General* tab.
2. On the *General* tab, select the option *Enable Silent Assignments*.
3. Click *Save changes* when you are done.

If you enable silent assignments, the users on the required member lists receive no bell notifications, feed entries, and e-mail notifications informing them about their assignment to the group. If you have configured terms of use for the group, the users still have to accept the terms of use before they can start working in the group.

5.2 Download a member list

Group administrators can download a list of group members to a .csv or .xslx file to sort, search, or analyze specific member data outside of SAP Jam.

The Group Member List report replaces and improves the existing member list export that was previously obtained via the Download.csv button on the group members page; that button has been removed as of the February 2017 release. You no longer need to wait for the export to complete after making the request. The report generation occurs in the background and you will be notified when it's complete, as with other reports.

5.3 Deprecation and removal of auto group feature

> **i Note**
>
> The Auto groups feature began deprecation as of the August 2016 release. It will be removed from the application by the general availability release date of Thursday, December 8, 2016. Auto groups will be migrated to the appropriate type of regular group. The rules used to govern their membership will be migrated into new dynamic member lists where those lists will be applied to the group. If static member lists were used to manage the Auto group, then the new group type will continue to use those static member lists for membership management. Administrators can no longer create or edit auto groups.

6 Users and groups

6.1 Allow users to request to join a private group

As a group administrator, you can configure a private group to allow internal non-members to submit a request to join. A colleague- initiated request removes the need to send individual invitations, and supports open invitation policies.

> **i Note**
>
> This feature is unavailable to external guest user accounts.

To enable the request to join feature on an existing group

1. Go to the Groups drop-down menu and choose *View All Groups*.
2. Select your group and then choose *Edit Group* from the Group Admin drop-down menu on the left side navigation.
3. On the General tab, under Invite Policy, click *Select Group URL Text*.
4. Paste and send the URL to the intended members by other means (e.g., email, communities, etc.)

When a colleague clicks the group URL, they are taken to the group's landing page where they can click *Request to Join*. The group administrator is notified when there are pending requests for the group. All requests are located under the Pending Request list where they can verify who made the request, view the reason for joining, and either accept or deny each request. When there are multiple group administrators in the group, any group administrator can accept or deny membership requests.

6.2 Invite your company colleagues to a group

After a private or public group has been created, you can begin to invite colleagues from your company to collaborate as members. You can invite individual members, multi-select members from a list, import a CSV file with a list of email addresses on each row, or choose a pre-configured member list when composing your invitation.

1. From the group page, click *Invite* below the group profile photo or from the group header.
2. In the *Add People to the Group Invitation List* text box, enter the employee name, email addresses, or group member list (created by the company administrator) that you want to invite to the group. If the people you are inviting already use SAP Jam, you can enter their name and the auto-complete function will help you find the right person.
3. Enter a personal message (optional; can include details about why you are sending the invitation, purpose of the group, etc.) and then click *Send*.

i Note

When managing invitations for internal groups, you can only invite participants who are in your company's e-mail domain.

i Note

On the members list page, the following information is included to help decide whether more invites should be sent to a particular user:

- Last invited: The date the user was last invited to the group.
- Invite reminders: The number of invitation reminders that were sent to the user; indicated in brackets.

When exporting the member list to a CSV file, the "Last invited" and "Invite reminders" data is included.

The invitee will receive an email notification about your invitation and then can choose to accept or reject your invitation.

Colleagues can remove themselves from membership if they select *Leave Group* from the Group Settings menu, or they can select *Stop following this group* to no longer receive updates from the group in their Home feed.

i Note

Once access to the group is granted, group admins can remove access to the group.

6.3 Invite external participants to a group

If permitted by your company policy, group membership can extend to those outside your company (e.g., vendors, clients, third parties). You can invite such participants or "guests" to collaborate in a private external group. This allows you to share information without the guest obtaining access to other company information reserved for employees only. As a group administrator, you can also remove the external participant from the group.

External registration process

When you send an invitation, your guest will receive an invitation from *notification@sapnetworkmail.com* to register as a guest in your company's SAP Jam network with a SAP ID account. When the guest clicks the "View group invitation" link in the email invitation, they will be asked to register for SAP ID or confirm their existing SAP ID credentials before they are given access to SAP Jam.

i Note

SAP ID is a central authentication service used by all SAP websites and SAP BTP applications.

External access

External participants can access the following:

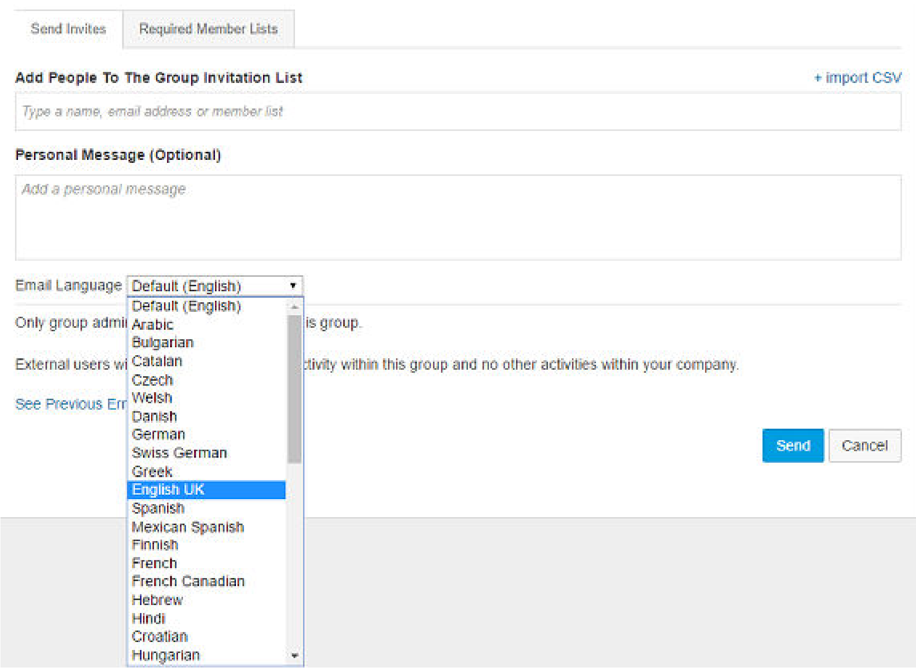
- **Home**: Feed updates are a summary of the guest's group activities.
- **Profile**: Guests can maintain basic profile information, contact information and upload a photo. They cannot browse for or follow other guests' profiles.
- **Groups**: Guests are not allowed to create new groups or browse for existing groups; they can only see groups they belong to. Within a group, external participants can create content and browse a limited profile for other group members (internal and external).

> **i Note**
>
> The Search feature is unavailable to guests.

Troubleshooting external registrations

If your guests have trouble registering for SAP Jam, ensure that:

- Your guests have carefully read the instructions in the email invitation.
- Your guests have registered with the same email address that you entered for them in their invitation.
- You sent your guests an invitation to the group, and did not forward a link.



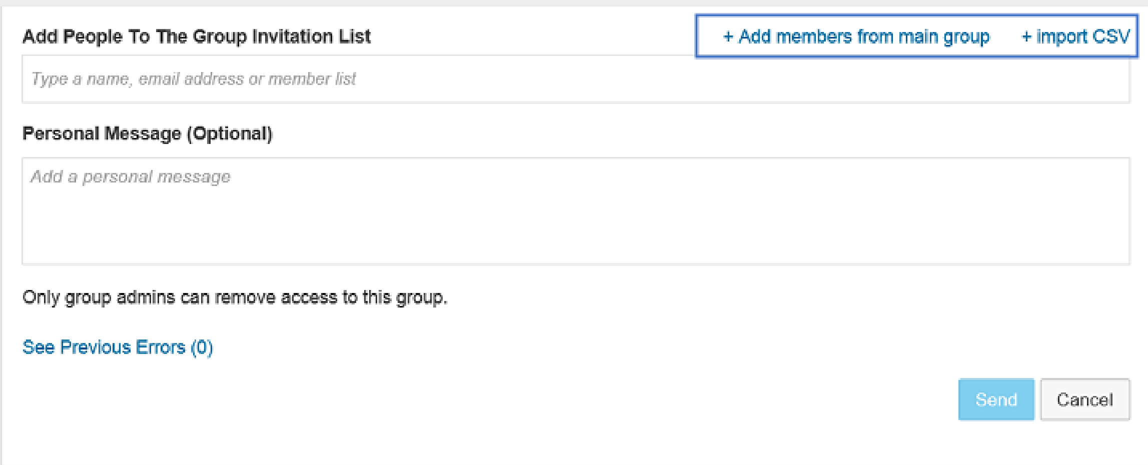
You can also specify the locale for the invite

6.4 Invite SAP Jam users to a subgroup

When you send an invitation for a user to join a subgroup, you are granting access to both main group and subgroup. In inviting a user to the main group, they must also accept the main group's Terms of Use.

To invite a user to join a subgroup

1. Select the main group from the Groups dropdown menu.
2. Click *Subgroups* from the left side panel or if more than one subgroup is available, select the subgroup from the dropdown on the menu navigation.
3. On the subgroup avatar, click *Invite*.
4. On the Add People to the Group Invitation List text box, you can invite members by entering names, email addresses, or member list names. You can also click *import CSV* to upload a CSV containing member email addresses. Or click *Add members from main group*.



Add People to the Group Invitation List

5. (Optional) Enter a personal message to accompany the invitation to all recipients.
6. Click *Send* to send the invitations. A summary list displays who invited which members, and whether the members have accepted the invitations.

6.5 Feature a member

Groups may have particular members who require high visibility for various reasons (e.g., member is identified as a leader or a frequent point of contact, must be recognized for a notable accomplishment or circumstance, etc.). Group administrators can select those members to be featured within the group whenever the page designer configures a People widget to use a featured member display.

To feature a member

1. Below the group avatar, click the members hyperlink.

2. From the list of members, on the row for the member you want to feature, click the *Actions* drop-down menu and choose *Feature this Member*.
3. In the description text box, enter a reason for featuring this member. The text for the reason displays in People widgets using the featured member display filter.

6.6 Bulk send invite reminder

You can remind several group invitees at once about your group invitation. When you send a reminder, they will receive a notification.

To send invite reminders to selected members

1. From the group overview page group avatar, click the link to the members list.
2. From the members filter, you can choose from All Members, Admins, Members, Pending Invitations, and more. You can leave it to the default All Members or select a filter.
3. Go through the list and click the users you want to send reminders to, or click *Select All*.
4. Click Actions and choose *Send Invite Reminder*.
5. Click *OK* on the confirmation dialog to send the reminder notification.

6.7 Bulk removal of pending invites

Some company colleagues may choose not accept certain group invitations for various reasons. You can remove easily remove those outstanding invitations so as not to resend reminder invites to others who may never to join your group.

To remove a pending invitation

1. Below the group avatar, click the number of members to view the group member list.
2. By default, all members display in the list. From the members filter, select "Pending Invitations.
3. Select the member invitations you'd like to remove, or click *Select All*.
4. Choose *Actions* > *Cancel Invites* and then *OK* on the confirmation message.

6.8 Bulk removal of members

Under the *Actions* menu above the group membership list, you can select multiple group members and remove them from the group.

> **Note**
>
> You cannot remove yourself if you are the only group administrator for the group. There must always be one group administrator assigned per group. If you want to remove yourself as group administrator, first make sure that at least one other group member has group admin privileges.

To remove selected members from a group

1. From the group overview page group avatar, click the link to the members list.
2. From the members filter, you can choose from All Members, Admins, Members, Pending Invitations, and more. You can leave it to the default All Members or select a filter.
3. Go through the list and click the users you want to remove.
4. Click Actions and choose *Remove from Group*.
5. Click *OK* on the confirmation dialog to remove those members from the group.
6. An action processing notice displays. You'll receive a bell notification once the removal is complete.

To remove all members from a group

1. From the group overview page group avatar, click the link to the members list.
2. From the members filter, you can choose from All Members, Admins, Members, Pending Invitations, and more. You can leave it to the default All Members or select a filter.
3. Click *Select All* above the list. If you choose to remove all admins, please refer to the previous note.
4. Click Actions and choose *Remove from Group*.
5. Click *OK* on the confirmation dialog to remove those members from the group.
6. An action processing notice displays. You'll receive a bell notification once the removal is complete.

6.9 Create a Terms of Use for a group

You can create a user agreement (terms of use) that members have to accept before they can access the group. When you change the terms, members must re-accept them before they can continue accessing the group.

1. Access the Group Admin [page 7] menu and choose *Edit Group*. The *Edit Group* page appears, defaulting to the *General* tab.
2. Click the *Setup* tab.
3. On the *Setup* tab under *Terms of Use*, enter a text for the Terms of Use that users have to accept before they can join the group.
4. Save your settings.

Terms of Use in multiple languages

If the members of your group speak different languages, you can create Terms of Use in multiple languages. You can create a translation of your Terms of Use for your group as follows:

1. Access the Group Admin [page 7] menu and choose *Edit Group*. The *Edit Group* page appears, defaulting to the *General* tab.
2. Click the *Setup* tab.
3. On the *Setup* tab page, under *Terms of Use*, open the menu above the text box and select the language for the translation.
4. Enter the translated text into the text box.
5. Save the settings.

You can create Terms of Use in multiple languages by repeating the steps above for each language.

The invited users receive the Terms of Use in their preferred language if you have created a translation in this language. If no translation for their preferred language exists, they receive the default Terms of Use. You can set a translation of the Terms of Use as the default Terms of Use as follows:

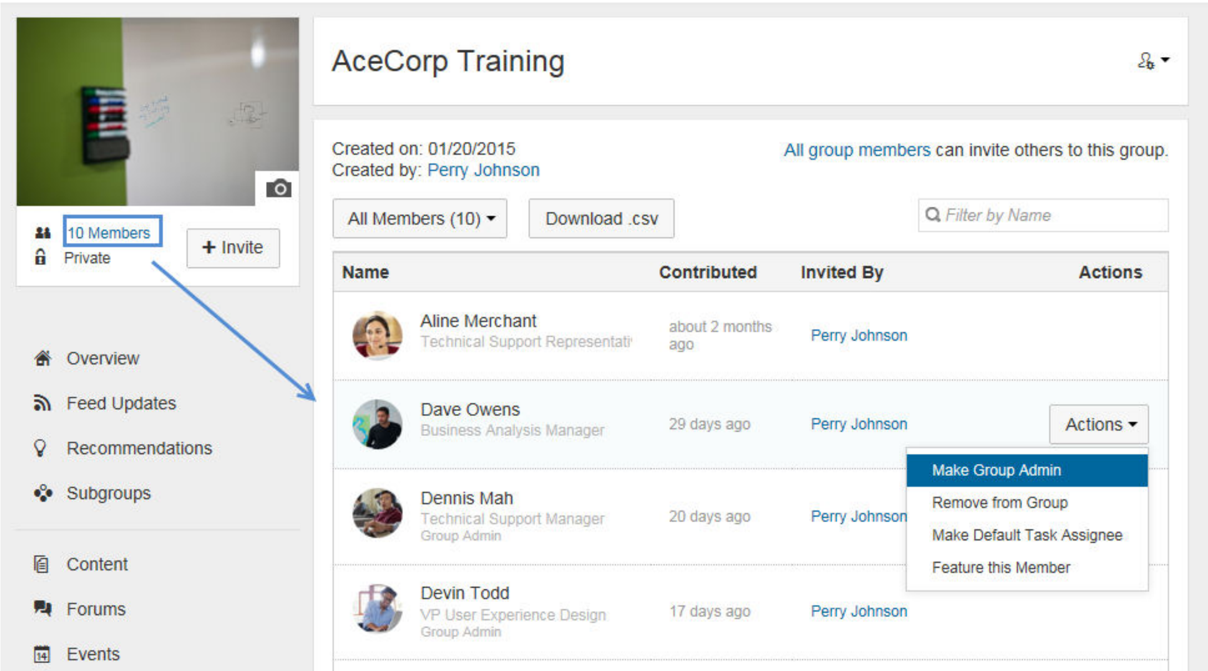
1. Access the Group Admin [page 7] menu and choose *Edit Group*. The *Edit Group* page appears, defaulting to the *General* tab.
2. On the *Setup* tab page, under *Terms of Use*, open the menu above the text box and select the language of the Terms of Use that you want to use as default.
3. Choose *Save as Default*.
4. Save your settings.

7 Manage groups

7.1 Group admin privileges

Group members can send a request to the group administrator to add group administrator privileges to their account. All group administrators for the group will then receive a bell notification with the details of the request (e.g., who is making the request and for which group). You can click **Grant** to automatically allow the group member to have group administrator privilege, or click **Reject**.

If you already know which group members can be assigned group administrator privileges, you can go to the group member list, and beside the member's name, choose **Actions > Make Group Admin**.



Group members list

Remove group admin access

To remove group administrator privileges from a member

1. Below the group image or avatar on the left side of the group page, click the number of members to go to the group member list.
2. Go to the row for the group member. Place your cursor under the Actions column and the choose **Actions > Remove Group Admin**. A confirmation message will appear at the top of the page.

> **i Note**
>
> If you want to remove yourself as a group administrator from a group, you can follow the previous steps for your own account. Make sure that there is another group administrator, or that you have assigned

> group admin privileges to another member before you remove your own admin privileges. Company administrators can always assign group administrator privileges to other group members upon request (e.g., current group administrator is unavailable due to leave of absence, no longer with company, etc.)

7.2 Edit group settings

Group administrators can enable and configure a variety of settings that determine how group members can engage with their group. There are three tabs that the group administrator can work with:

- **General**: Includes basic attributes such as name, description, and group type.
- **Setup**: Includes terms of use, group avatar, calendar view, left navigation menu configuration, trash settings, and administrative area.
- **Participation**: Includes choice of collaboration level, upload policy, content approval by selected group members for feed posts, forum posts, and different content types, default email notification settings, task policy, @@notify usage, and content rating.

> **i Note**
>
> You can only change a group's details if you are the group administrator of the respective group.

7.2.1 General

Use the General tab to configure the basic settings for your group. For example, name and description are the first things about a group that community users will see.

General settings

To edit general settings

1. From the navigation, click *Group Admin > Edit Group*. The Edit Group page appears, defaulting to the General tab.
2. You can edit the following attributes:
   - **Name**: Modify the group name by changing the text and then checking to see if it's unique by clicking *Check Group Name*.
   - **Description**: Enter a brief but meaningful description that will help everyone recognize the purpose of your group.
   - **Group Type**: Choose from one of the following:
     - Public: Anyone within your community can view and join your group.
     - Private: Only invited participants can join your group.
   - **Invite Policy**: Choose from one of the following:

    - All Group Members: Any group member can send an invitation to join your group.
    - Only Group Admins: Only group administrators for your group can send invitations to join your group.
- *Visibility Policy*:
    - *Allow others to discover this group*: To make the group searchable and found in search results by non-members, you can select this option. It also automatically selects *Allow others to request to join this group*. You can disable either or both options when required.

        > **i Note**
        >
        > Private group discoverability is not currently supported for sub groups.

    - *Allow others to request to join this group*: Non-members can submit a request to become a member. Once accepted they can access the group content.

    If sending the invitation outside of this application (for example, in case you want to send an invite using your email), you can click *Select Group URL Text* and copy and paste the URL into your custom invitation.
- *Enable Silent Assignments*: Enable silent assignments if you do not want that a notification is send to each user on a required member list that you assign to a group.
  If you enable silent assignments, the users on the required member lists receive no bell notifications, feed entries, and e-mail notifications informing them about their assignment to the group. If you have configured terms of use for the group, the users still have to accept the terms of use before they can start working in the group.
  For more information, see Assign users to a group via a member list [page 85].

3. Click *Save changes* when you are done.

7.2.2 Setup

Use the Setup tab to configure the functional appearance of the group (for example, calendar, group avatar, which features are enabled and therefore appear in the left navigation menu, accessible external folders from integrated applications), settings for trash and purge, choosing whether to display the Overview page or feed updates as the landing page, and if applicable, selection for the administrative area that the group belongs to.

Setup settings

To edit Setup settings

1. Access the Group Admin [page 7] menu and choose *Edit Group*. The Edit Group page appears, defaulting to the General tab.
2. Click the *Setup* tab.
3. Configure the following properties:
    - *Terms of Use*: Create custom Terms of Use that must be accepted by the member before they are granted access to the group. When you change the terms, members must re-accept them before they can continue access to the group. For more information, see Create a Terms of Use for a group [page 92].

- *Announcement*: Create a welcome message or user agreement for all group members to see on their first group visit.
- *Current Photo*: Upload a group picture for the group's main page. The maximum size for a group image is 110 x 110 px. Group avatar images of narrow size are not stretched and pixelated to fit the dimensions of the avatar space. They appear in their original size with white padding surrounding the remaining area of the maximum avatar space.
- *Navigation*: If the company administrator has not enforced the application of header styles to all groups, you can choose between header or sidebar navigation styles for your group. If you choose Header, you can optionally select:
    - *Full width page for header style navigation*: When enabled with the header style navigation, the full width of the page can be used to design overview pages. If you choose this option, you can optionally select:
        - *Enable 4th Column*: Add a fourth column for more versatility when designing overview pages. Warning: This setting is irreversible once changes are saved.
- *Landing Page*:
    - *Overview page*: When selected, the Overview page will display rather than the group's feed.
    - *Feed*: The group feed activity displays as the landing page.
- *Default Calendar View*: Choose from month, week, day or list view.
- *Customize what is available in this group*

> **i Note**
>
> These items must be enabled in order to display in the navigation.

    - **Messages**: Group members can access group messages, a quick and convenient way to converse with others.
    - **Recommendations section**: In a tiled view, lists recommended content based on featured content, highest ratings, most likes and views, for the current month, week, and/or current day. It can also display the group's featured members and most active members.
    - **Content Section**: Depending on participation settings, members can view, upload, create, copy, mirror, move, and delete content items.
    - **Subgroups Section**: In a tiled view, lists all subgroups for a given group, indicating the number of members, whether it's public or private, when the group was last active, and whether the user is already a member. If enabled, the user can also create a subgroup from this view.
    - **Events Section**: The group calendar displays the current month's events. Members can scroll the calendar or change their view to week, day, or list, set the time zone and first day of week for the calendar, and create new events.
    - **Forums Section**: Lists forums for members to ask questions, start discussions, or present ideas.
    - **Links Section**: A view-only list of various hyperlinks previously posted by group members. New hyperlinks must now be added via the Content section.
    - **Tasks Section**: Lists current, overdue, and completed tasks. Members can also add new tasks here.
    - **Knowledge Base Section**: By default, the knowledge base feature is enabled for a group when the company setting for the knowledge base feature is enabled. As a group administrator, you can enable or disable the availability of the knowledge base feature for your group when editing the group settings. Lists existing knowledge base articles, allows group members to create new articles, and creation of custom templates. Company administrators can also enable or disable this feature company-wide. If knowledge base articles are enabled for a company, then knowledge

base articles can be accessed via the global menu bar. If you disable the knowledge base feature after knowledge base articles have been created and published for the group, the articles will no longer display in the group and company knowledge base. The company knowledge base continues to display unless disabled by the company administrator.

    - **Any external applications configured by the company administrator**: External applications (for example, SharePoint, Alfresco) can be configured and accessible from the navigation. You can also configure repositories for existing Microsoft Office 365 integrations that have been set up by your company administrator.
  - **Group Trash**: Set an automatic purge for items that have been in Trash for a specified number of days.
4. Click *Save changes* when you are done.

7.2.3 Participation

Use the Participation tab to specify the degree to which group members can collaborate, which sets of members can upload content, what content requires approval and which members can approve, how often members are to receive email notifications from the group, who can update or edit tasks, and enablement of @@notify and content ratings.

Participation settings

To edit participation settings

1. Access the Group Admin [page 7] menu and choose *Edit Group*. The Edit Group page appears, defaulting to the General tab.
2. Click the *Participation* tab.
3. You can edit the following participation settings:
  - *Collaboration Level*: Specify the degree of social collaboration for group admins and users.
    - *Read-only*:
      - Group administrators can share, view, tag, and download content in a group and comment on items.
      - Non group administrator users can view and download group content, but they are not allowed to comment, tag, post or edit. Chats, discussions, polls, and tasks are not available.
      - This group type is most suitable for broadcasting information only.
    - *Limited*:
      - Group administrators can share, view, tag, like, and add comments on content and create tasks.
      - Non group administrator users can view, like, and add comments on content.
        - Move action: Users cannot move content within or outside of a group with limited permissions.
        - Mirror action: Users can mirror a document from a limited group to another group that they can access. Mirroring a document within a limited group is not allowed.
    - *Full* :
      - Group administrators can create, edit, post, comment, like, tag, and view group content, and customize the upload policy.

        - Non group administrator users can create, edit, post, comment, like, tag, and view group content.
- *Upload Policy* If you choose the full participation setting, you can restrict the upload policy according to your needs:
    - *All Members*: All group members and group administrator can upload new content
    - *All Group Members*: All group members can upload new content items.
    - *Only Group Admins*: Only the group administrator can upload new content items. All group members are allowed to comment or edit content.
- *Content Approval*: (replaces "Moderation Policy" effective February 2016 release) This provides content publishing safe-guards to ensure content is appropriate for the business context within a group. You can choose whether the same approval policy applies to all content, forum and feed posts, or apply specific approval policies to each item.
  For each approval policy, you must indicate the member type (e.g., any selected group member, all selected group members, or any group administrator) that can approve and then select specific members (*Select members*) as approvers. You may need to select multiple approvers for different reasons: one approver serves as a back up in case the other approver is away when "any selected group member" can approve, or all selected subject matter experts are required to review various parts of the content before it can be published to a wider audience.
  If you need to remove a selected approver, click the x beside their name.
  If no approval policies are required, select "None." Otherwise, you can select one of the following types of approval policies:
    - **Apply the same approval policy to all blog posts, documents, photos, videos, feed posts, forum posts, and wiki pages before they become visible**.
    - **Apply a specific approval policy to each item**. If you select this option, you can choose to set policies for one, some, or all items as necessary.
        - Blog Posts
        - Documents, Images, and Videos
        - Feed Posts
        - Forum Posts
        - Wiki Pages
        - Knowledge Base Articles

    > **i Note**
    >
    > If the content to be approved resides in a private folder, it is recommended that you choose the "Any selected group member can approve" policy with multiple members to help account for a situation where not all approvers have access to a given private folders.
- **Email Notifications**: Choose the default notification frequency for the group (i.e., Immediate, Daily, Weekly, None). If you change the notification at a later time, group members will receive a bell notification regarding the change. Members will have an opportunity to accept or reject the change as per their preferences.
- *Task Policy*: You can set a group level permission to enable task editing for other users. This section displays only when the collaboration level is set to Limited or Full. For all permissions below, tasks can be edited by group administrators and task creators
    - *Read-only*: Assignees can update their own task status. Non-assignees can view tasks only.
    - *Limited*: All users can update the status of any task. Non-assignees can also view but not update other task details.

- *Full*: All users can edit the details for any task.
- *Enable @@notify*: If selected, users can send notifications to all group followers. As a group administrator, you can disable this to help minimize unwanted notifications in large groups. When you disable the @@notify feature for all group members, it is still enabled for group administrator use only.
- *Enable Content Rating*: If selected, allows users to rate content that has been uploaded to SAP Jam.

7.2.3.1 Content approval

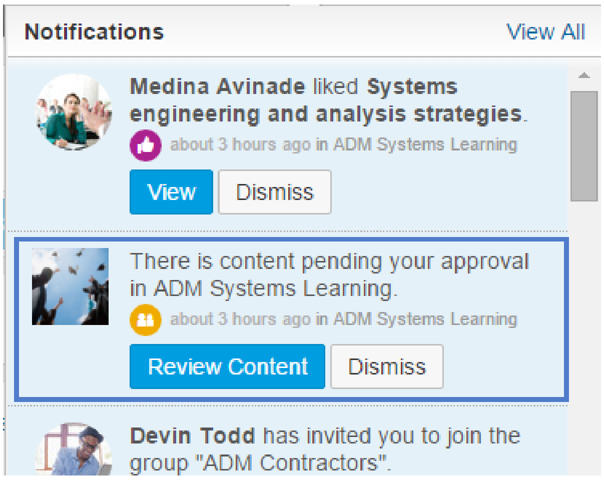
When configuring approval policies for your group, if you selected "Any group administrator can approve" or any other policy and then selected your name as an approver, that makes you responsible for reviewing and accepting or rejecting content items, feed posts, and/or forum posts. If you configured a policy where you are not an approver, as group administrator, you have the ability to override the approval process and still approve or reject an item. This is for situations where one or all selected approvers are unavailable while the item to be reviewed is time sensitive.

Pending my approval items: review, approve or reject content

Content reviewers are sent bell notifications anytime their attention is required for a content approval. They can also click *Pending Approval* from the group navigation to view a list of outstanding items which require their approval.

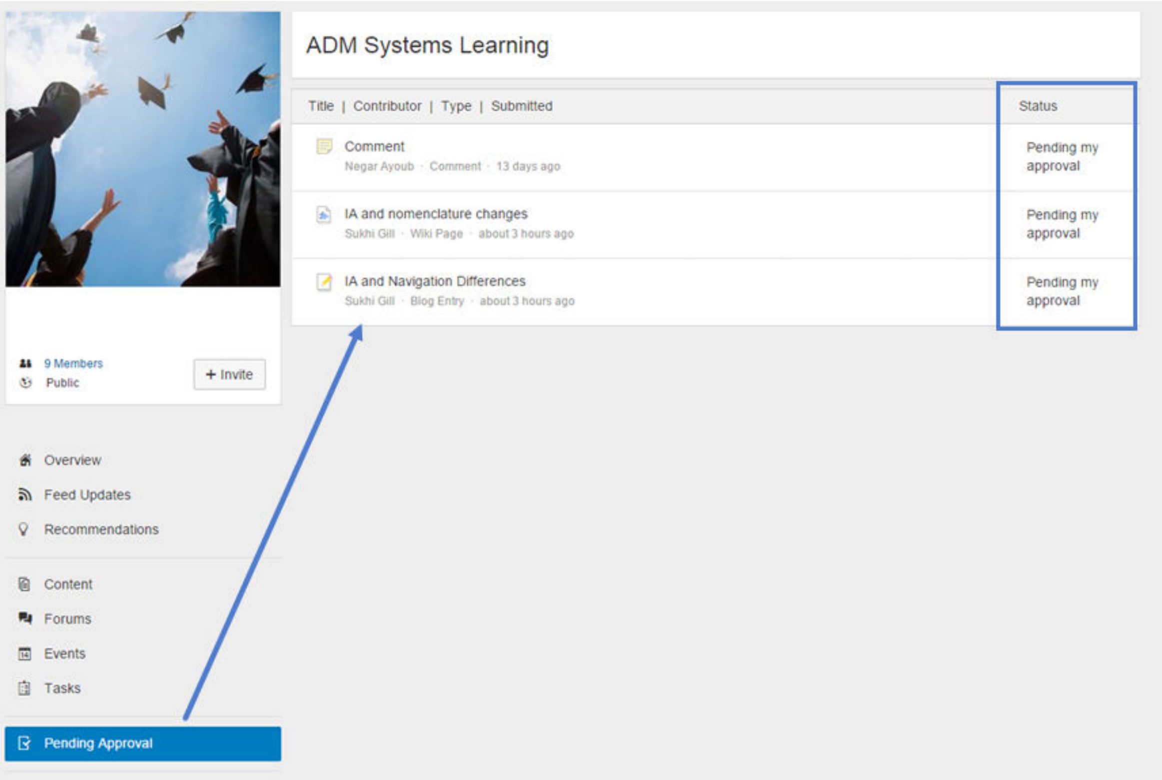
To review and then approve or reject content for which you are one of a selected set of members who can approve content/comments

1. Check your bell notifications for a content review request and then click *Review Content*.



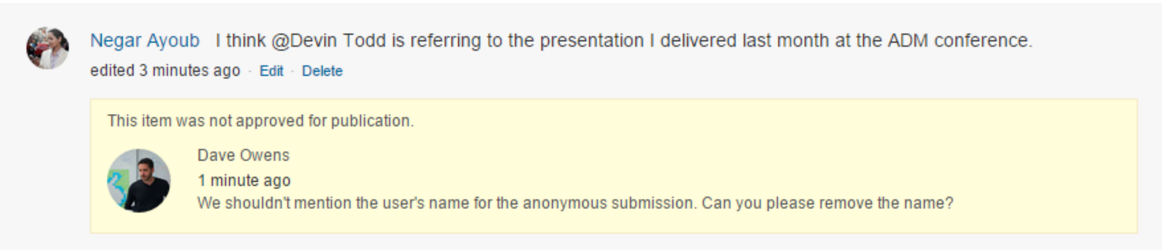
Bell notification with content approval message

2. Or, click *Pending Approval* to view of listing of items pending your approval.



Pending approval list

3. Click the item to open it in single item view (for content, feed items, and forum topics).
4. Review the item and click *Approve* or *Reject*.
5. If you reject the item, provide a reason for why the content has not been accepted, and tips if any on corrective action (e.g., editing the rejected post to make the necessary corrections before publishing it again; this would start a new approval workflow) that can be taken by the author. The content author will then receive a bell notification to let them know that the item was not approved. They can click *View* to read your rejection comment on why it was not approved for publication.



Feed item with rejection message

When reviewing content where all selected members must approve it before it can be published, a bell notification displays when one member has rejected the item. For example, if three group members are selected to approve a wiki page, and one member out of the three rejects the item, then the other two content approver members are notified with a bell notification that it has been rejected.

Regardless if a group administrator is also a selected member for a content approval workflow, they will have options to override and accept or reject an item. This covers situations where a selected non group administrator member is unable to accept or reject a content item because they are unavailable.

Pending other's approval items: override to approve or reject content

If a content approver is unable to review an item, causing it to be stalled in the approval process, the group administrator can act as a substitute approver and approve or reject the item.

To override and approve or reject an item

1. On the group page, from the navigation, choose *Pending Approval*.
2. From the list of items that are pending other's approvals, choose the item that you want to review.
3. After you review the item, choose *More > Override and Approve* or *More > Override and Reject*. If you reject the item, you have the option to enter text on why the item was rejected. The content owner will then receive a notification with a reason for why the item was rejected.

> **i Note**
>
> You also have the option to delete the item. Deleted content items will be moved to the group trash.

7.3 Forums

Forums are used to group general discussions, questions and answers, and ideas to focus upon. Group members add questions, ideas and discussions to a forum topic and can change the forum topic's name. Group administrators can create, move, edit and delete specific forums or idea forums.

You can create up to four unique forum types:

- **Questions only**: Group members are provided with a forum to ask questions.
- **Ideas only**: Group members can share their ideas where they can be voted upon and moved through an approval workflow with statuses (e.g., Submitted, In progress, Accepted, etc.).
- **Discussions only**: Group members are provided with a forum to start new discussions.
- **Discussions, Ideas, and Questions**: Group members are prompted to ask a question, add and idea, or start a discussion in this general category.

> **i Note**
>
> Group members cannot create topics that do not belong within their specified forum type. For example, you cannot ask a question within a forum type for ideas only or discussions only.

Questions

Group members can create a question when they want to submit a question to a group, obtain answers, and designate when a question has been answered with the best answer. Group administrators and question creators can mark a particular answer as a 'Best Answer', which will move to the top of the replies section to easily stand out amongst all answers. Only one answer can be marked as the best answer. To select the best answer, click *Mark Best Answer* below the answer, and then question is then labeled as **Best Answer**.This allows other users to quickly identify correct or most up-to-date information when they search the forum. In the

questions list view, group administrators can easily see which questions have been answered without clicking into them, and see which ones need attention.

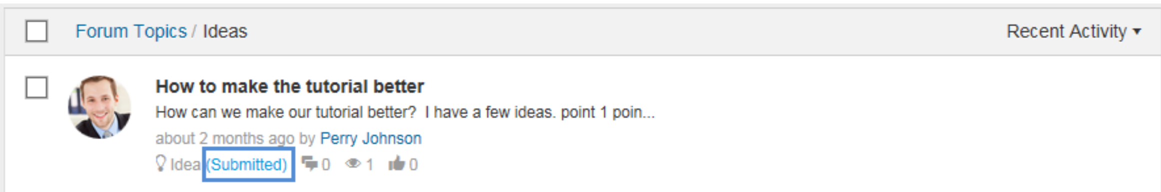
Should a group member provide another answer that satisfies the question more so than the one marked Best Answer, group administrators or question creators can select **Mark Best Answer** for that answer instead. If group administrators or question creators decide that the current Best Answer may not be the case, they can select **Unmark Best Answer** for that answer and wait for a more suitable one.

Ideas

If a group member has an idea and would like to share it with other members for feedback or to initiate discussion, they can create an idea and post it on the group feed. Idea management can be an effective way to get feedback and advice from employees, partners or customers that are invited to the group. Group administrators can create Forum Topics to collect ideas on things like how to solve workplace challenges or which products to develop. Ideas use a format geared towards posting ideas and having other group members vote on these ideas and provide additional feedback on them. After group members provide feedback by voting an idea 'up' or 'down' or providing comments on an idea, they can look at the total amount of votes to gauge the overall sentiment of your audience towards the ideas submitted. 'Up' votes and 'Down' votes are tracked independently of one another, rather than 'down' votes detracting from 'up' vote counts.

Group administrators can set the following 'states' of an idea to indicate where it stands in the ideation life cycle:

- **Submitted**: The idea has been entered by the idea owner, but not yet formally reviewed



Status of idea forum topic

- **In Progress**: The idea is under formal review, with the review outcome pending.
- **Accepted**: The idea has been accepted after formal review.
- **Declined**: The idea has been declined after formal review.
- **Under Consideration**: The idea is under consideration after formal review, but not yet accepted or committed to.
- **Completed**: The idea's implementation has been completed.

Edit, delete, and move topics

As topic forums and individual questions, ideas, and discussions are created, the forums section may require re-organization, renaming, and removal of older or no longer useful forum items.

> **i Note**
>
> - If there is an Actions widget on a group overview page with a form topic action enabled, when the forum type is changed by the group administrator, the form topic action will be removed from the Actions

widget. A notification will sent to the other group administrator(s) when the forum type is changed, affecting the Actions widget. It is up to the group administrator to take corrective action (e.g., change the forum type in the Actions widget), if necessary.

To edit a forum topic

1. Choose Forums from the left side menu.
2. From the list of forum topics, click the Gear icon that appears when you hover your cursor at the far end of the row.
3. Click **Edit** to view the Edit Forum Topic dialog.
4. Change the name of the topic and/or select the forum type from the drop-down list.
5. Click **Submit** to apply your changes.

To delete a topic

1. From the list of forum topics, click the Gear icon that appears when you hover your cursor at the far end of the row.
2. Click **Delete**. A confirmation message will appear; click **Delete** again.

To delete a question, idea, or discussion within a forum topic

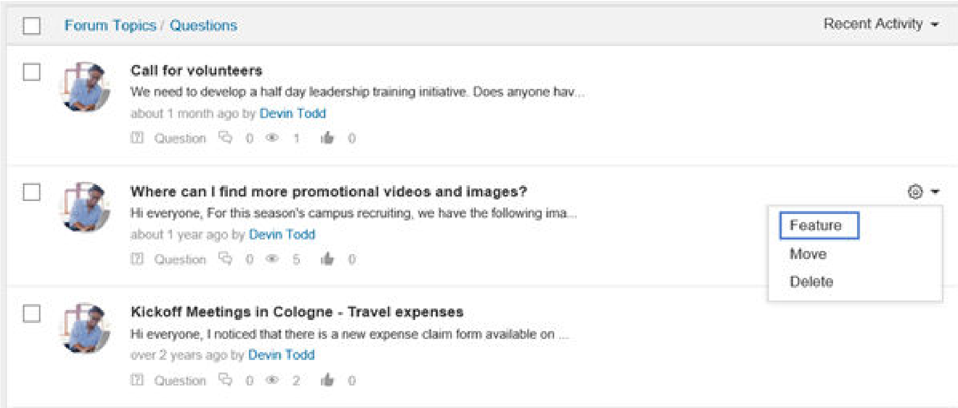
1. Click on the forum topic.
2. Go to the row with the question, idea, or discussion you want to remove.
3. Place your cursor near the end of the row to show the Gear icon, then click **Delete** from the pop-up menu.
4. A confirmation message appears; click **Delete** again.

To move a question, idea, or discussion to another forum topic

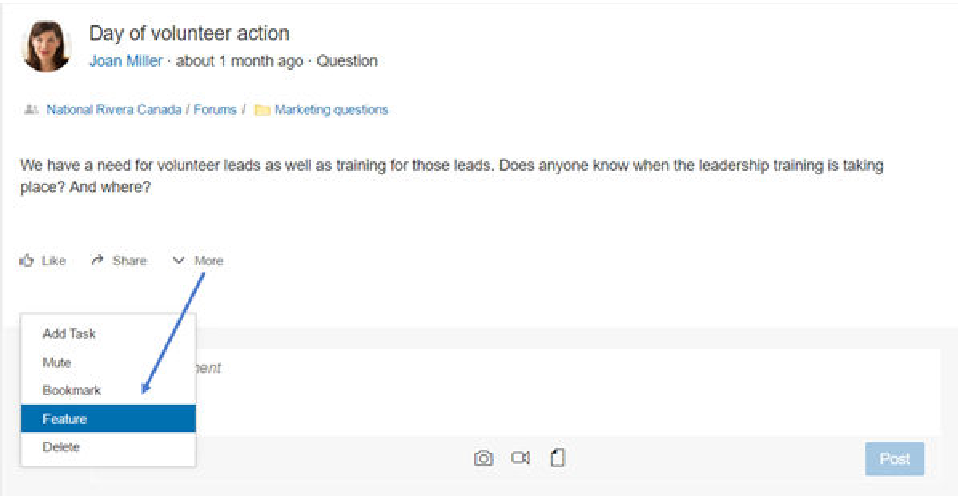
1. Click on the forum topic.
2. Go to the row with the question, idea, or discussion you want to move.
3. Place your cursor near the end of the row to show the Gear icon, then click **Move** from the pop-up menu.
4. In the Move to dialog, click the forum type drop down list and select the forum topic.
5. Click **Move**. A confirmation message appears near the top of the page.

Feature a forum post

You can click the Gear icon beside the topic and choose *Feature*, or choose *More* > *Feature* from the single item view of the home page feed item or group feed item to feature any number of posts at the top of a forum topic so that it is quickly visible to forum users. The featured posts are listed at the top of the forum, in the order that they were featured.

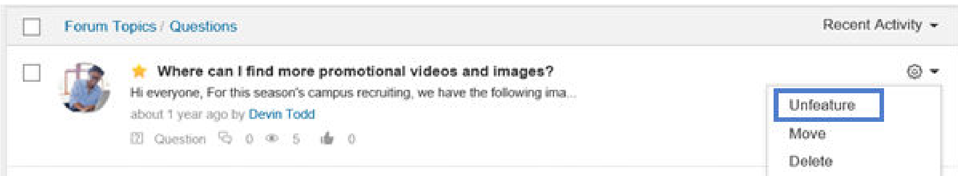


Feature a forum topic



Feature a forum post from single item view

You can also unfeature the post when it no longer requires prominent visibility.



Unfeature a forum post

Set topics to read only

You may need to set forum topics to read only so that topics are officially closed for further commenting. Members can view these topics, but they can no longer interact with replies, likes, etc.

To set a forum topics to read only

1. On the Forums page, go to the forum topic row that you would like to set to read only. All topics within that forum will be affected.
2. Hover your cursor at the end of the row to see the Gear icon, then choose *Edit*.
3. On the Edit Forum Topic dialog, go to the Forum Permissions drop-down menu and choose *Read only*.

4. Click *Submit*. A Read only label and lock icon appears beside the forum topic name.

Subscribe to topics

You may need to follow a specific forum to monitor questions as they are submitted and provide answers. Or, you may want to know if others have questions that may affect your work. Subscribing to a topic allows you to see updates in your feed and receive notifications so you can be aware of the latest forum activity.

To set subscribe to a forum topic

1. Choose Forums from the left side menu.
2. From the list of forum topics, click the Gear icon that appears when you hover your cursor at the far end of the topic row.
3. Click **Subscribe** to subscribe to the topic.
   If you want to unsubscribe from the topic, click the Gear icon that appears when you hover your cursor at the far end of the topic row and click *Unsubscribe*.

7.4 External content repositories

The following integrations display the content of document repositories in SAP Jam and can be prominently displayed in External Content [page 55] widgets on group overview pages:

- **CMIS**: Content Management Interoperability Services (CMIS) is an open standard that allows content management systems to inter-operate across a network. CMIS-compatible document repositories include:
  - **SharePoint 2013**
  - **SharePoint 2010**
  - **Alfresco One 4.2**
  - **SAP Extended ECM by OpenText**

  CMIS-compatible document repositories can only be accessed by using a common user account for credentials.
- **Office 365 SharePoint Online Sites**: This is a non-CMIS integration that uses Microsoft Azure's cloud platform.
  Office 365 SharePoint Online Site libraries can only by accessed using per-user credentials.
- **Box**: This is a non-CMIS integration that provides access to your organization's Box account as a document repository, specifically
  document files.
- **Google Drive**: This is a non-CMIS integration that provides access to your organization's Google Drive account as a document repository, specifically document files.

Naming the document repository

In the SAP Jam Admin console under *Product Setup* > *Integrations* > *External Applications*, when configuring a document repository, company administrators have the option to specify a more meaningful

label rather than use the default integration name. You as a group administrator can then override that label when editing the group under group admin settings only if the company admin enables the *Allow renaming of the external document integration name* option. When added or updated, the documentation integration names are also reflected in the group navigation and content navigation breadcrumb links.

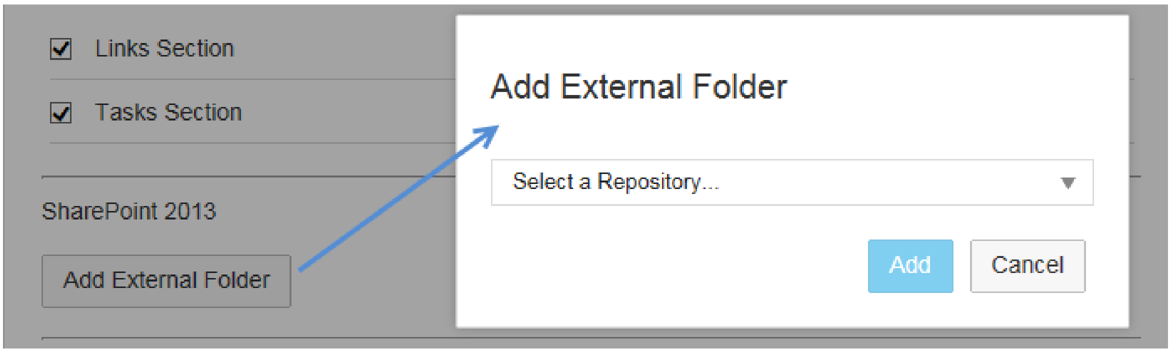
If company admins do not enable this option, the default name will remain consistent throughout the application and cannot be changed by you or any group admin.

7.4.1 Enable Microsoft® SharePoint® integration

After your company administrator has configured SharePoint under the external applications section of the SAP Jam Admin console, as a group administrator, you will need to enable SharePoint for your group so that group members can view and copy content from the SharePoint repository within SAP Jam.

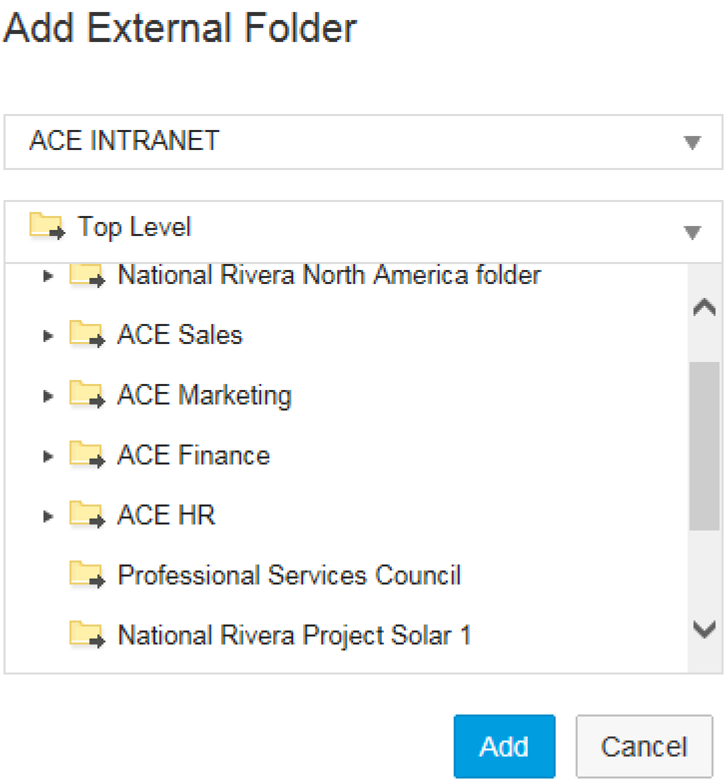
To enable SharePoint repositories in SAP Jam

1. Go to the group page and choose *Group Admin > Edit Group*.
2. The Edit Group page appears. Click the *Setup* tab.
3. Under the "Customize what is available in this group section", click *Add External Folder* below the applicable SharePoint version used by your organization.



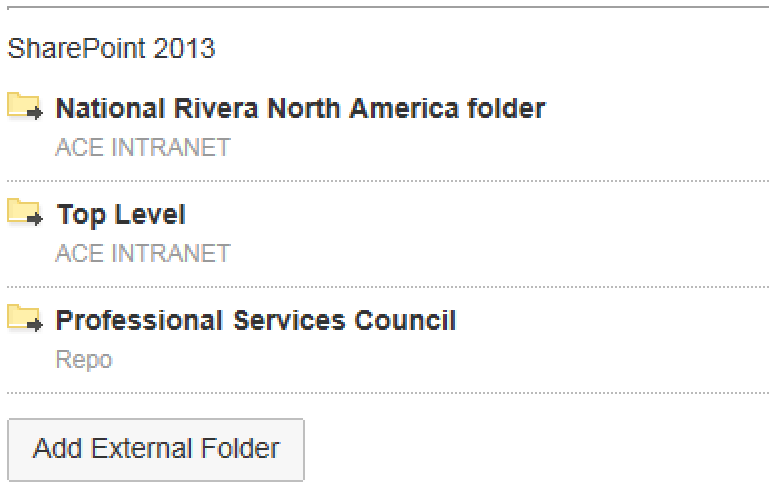
Add External folder dialog

4. In the Add External Folder dialog, click the *Select a Repository* drop-down menu and choose the SharePoint repository that you want linked into the SAP Jam group.
5. You can select individual folders from the SharePoint repository or leave the default at Top Level. Click *Add*.



Add external folder dialog

6. Repeat steps 3-5 until you've added all the required repository folders.



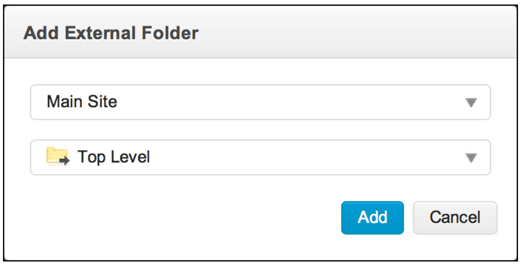
Add external folder dialog

7. Click *Save Changes*at the bottom of the Edit Group page.
8. When you return to the Group page, the SharePoint version that you enabled at step 3 above will display as a menu item on the group navigation. Click *SharePoint* to view the folders.

7.4.2 Access Office 365 Online Sites

To configure access to an Office 365 SharePoint Online Sites document library from within an SAP Jam group, access to Office 365 SharePoint Online Sites document libraries must first have been configured in the SAP Jam Collaboration Admin console's *Integrations* > *External Applications* page.

1. As a group administrator, from within the group in which you want to add access to an Office 365 SharePoint Online Sites document library, click *Group Admin* and select *Edit* from the drop-down menu.
   The *Edit Group* page displays.
2. In the *Edit Group* page, select the *Setup* tab.
3. Scroll down to the section for your Office 365 SharePoint Online Sites service and click *Add External Folder*.
   An *Add External Folder* dialog box displays.
4. In the *Add External Folder* dialog box, click *Select a Document Library*, and select the document library that you want to add access to in the group from the drop-down menu.
   A second drop-down menu displays.
5. From the secondary drop-down menu, select the document library folder that you want to have access to in your SAP Jam group, and click *Add*.

   Add External Folder dialog box

   The *Add External Folder* dialog box is closed, and you return to the *Edit Group* page.
6. At the bottom of the *Edit Group* page, click *Save changes*.
   You are returned to the group overview page, and the document library that you configured access to appears in the left navigation sidebar with the title of *Microsoft Office 365*. Note that the above procedure can be repeated to add access to as many document library folders as you want to have access to, although each of these must be added separately.

> **Note**
>
> Ensure that your Internet Explorer users have added the following sites to their list of *Trusted Sites*:
>
> - `https://login.microsoftonline.com`
> - `https://login.windows.net`
>
> To do this, have your users follow the *Add or remove a site from a security zone* instruction in the **Security zones** part of the page http://windows.microsoft.com/en-CA/internet-explorer/ie-security-privacy-settings#ie=ie-11 , in the *Trusted sites* option in the *Security* tab.

Your Microsoft Office 365 SharePoint Online Sites Document Library access configuration is now complete. Users can click on the Microsoft Office 365 option in the menu navigation, which will display a list of the available Microsoft Office 365 document repositories. While this is "read-only" access, user can comment on, annotate, and like the documents. Also, you can easily copy the displayed document repositories to other groups.

i Note

The search filter is unavailable.

7.4.3 Access document repositories

Once a company administrator has properly registered your external application and registered your document repositories or libraries for SharePoint 2013, SharePoint 2010, Alfresco One 4.2, SAP Extended ECM by OpenText, or Box (Box doesn't require that you registered document repositories) in SAP Jam, you must configure groups to access that external content from within groups.

To configure access to a document repository or library from within a group:

1. As a group administrator, from within the group in which you want to add access to a document library or repository, click *Group Admin* and select *Edit Group* from the drop-down menu.
   The *Edit Group* page displays.
2. In the *Edit Group* page, select the *Setup* tab.
3. Scroll down to the section for your **SharePoint 2013**, **SharePoint 2010**, **Alfresco One 4.2**, **SAP Extended ECM by OpenText**, or **Box** service and click *Add External Folder*.
   An *Add External Folder* dialog box displays.
4. In the *Add External Folder* dialog box, click *Select a Repository*, and select the document repository or library that you want to add access to from the drop-down menu.
   A second drop-down menu displays.
5. From the secondary drop-down menu, select the document repository folder that you want to have access to from within your SAP Jam group, and click *Add*.
   The *Add External Folder* dialog box is closed, and you return to the *Edit Group* page.
6. At the bottom of the *Edit Group* page, click *Save changes*.
   You are returned to the group overview page, and the document repository that you configured access to is displayed in the left navigation sidebar with the title of SAP Extended ECM by OpenText, SharePoint 2013, SharePoint 2010, or Alfresco One 4.2. Note that the above procedure can be repeated to add access to as many repository folders as you want to have access to.

Your Document Repository access configuration is now complete. Users can click on the <repository_name> option in the left navigation sidebar, which will display a list of the available document repositories. While this access is "read-only", user can comment on, annotate, and like the documents. Also, you can easily copy the displayed document repositories to other groups.

7.4.4 Search engine and indexing

When a document is indexed in the SAP Jam search engine, this allows it to be searchable by the user in SAP Jam. Before it can be indexed, the user must first access the document.

With CMIS integrations that support per user authentication and user-level access control enforcement, the results of the SAP Jam search will only include what is accessible to the user who has performed the search.

7.5 Knowledge base templates

Service agents and managers can create and use knowledge base articles to find the right information required by a customer at the right time, reducing call handle time, improving operational efficiencies, increasing customer engagement, and reducing labor costs. Categories can be created for products and processes.

Create a custom knowledge base template

As a group administrator, you can create custom templates so that articles have a structure that meets the standards and requirements of your team. You can design your own template or copy an existing template and customize it as needed.

As a group or company administrator, you can also apply custom styling such as font type, size, color, and style to all field titles and label text. Before you publish the template, you can click *Preview* to see what the labels and fields will look like.

To create a custom knowledge base template

1. Click *Knowledge Base* from the group navigation.
2. At the top of the page below the group name, click *Templates*.
3. Below *Templates* click *+ Template*. The New Template dialog box displays.
4. Enter a meaningful name for the template and provide a brief description of its purpose before you click *Create*.
5. You can now design you template with various field styles. Add as many as required by clicking *+ Field* and then selecting any of the following:
    - **single line text box**: add a title for the text box and any text you'd like displayed to the reader of the article.
    - **multiple line text box**: add a title for the text box and any text you'd like displayed to the reader of the article.
    - **checkboxes**: add a title for the grouping of checkbox selections, and then provide labels for each checkbox. Click *+Add option* to add a checkbox.
    - **radio buttons**: add a title for the grouping of radio button selections, and then provide labels for each radio button. Click *+Add option* to add a radio button.
    - **dropdown lists**: add a title for the grouping of dropdown selections, and then provide labels for each dropdown option. Click *+Add option* to add a dropdown option.
    - **date fields**: add a title for the date field.
    - **file attachments**: add a title for the file attachments section.

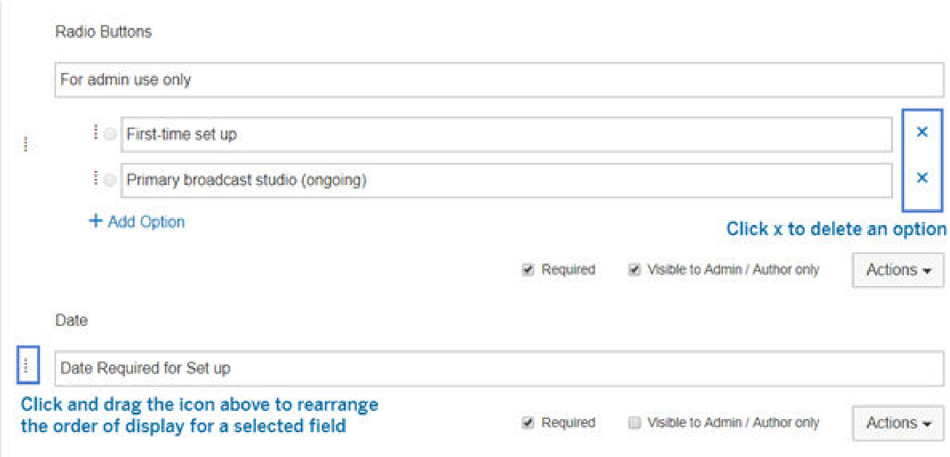
      > i Note
      >
      > Titles can also be instructions or brief descriptions.

    - **static content**: add text, multimedia, and images that are static and cannot be removed or edited by knowledge base article authors.
6. If you need to delete a field, choose *Actions* > *Delete* to the bottom right of the field you want to remove.

7. If you need to duplicate a field, choose *Actions* > *Duplicate* to the bottom right of the field you want to duplicate. The duplicate will be added directly below that field.
8. For each field, you can choose to make it Required for everyone to complete, and/or make shown only to administrators, article authors, or those who can edit the articles.

> **i Note**
>
> If you change a field from optional to required or required to optional when there are existing articles based on that knowledge base template, the existing articles are not affected by the change unless they are edited using the new template and then saved.

9. If you want to reorder fields, click the dotted icon to the far left to drag and drop to the location where you want them to display.



Delete options, rearrange fields

10. Click *Publish* to make the template display in the list of available templates on the Knowledge Base templates page.

Enable or disable a knowledge base template

Once you've published your template to the list of available templates, you can decide whether to enable or disable it for group members to use when they create knowledge base articles. Or, if an already enabled template needs to be retired or taken offline, you can choose to disable it.

To enable or enable a knowledge base template

1. Click *Knowledge Base* from the group navigation.
2. At the top of the page below the group name, click *Templates*.
3. Find the template you want to enable or disable from the Templates list.
4. Click the toggle below the *Enable* column.

Copy a knowledge base template

To make it easier to create similar knowledge base templates within your group, or create identical copies for other groups, and then edit them as required, you can make a copy of an existing knowledge base template.

To copy an existing template

1. Click *Knowledge Base* from the group navigation.
2. At the top of the page below the group name, click *Templates*.
3. Find the template you want to copy from the Templates list.
4. Click the dropdown to the right of the toggle and choose *Copy*.
5. On the *Copy To* dialog, choose a group from the dropdown list and then click *OK*.
6. Go to the copied template and make edits if needed.

Edit a knowledge base template

You can edit a custom knowledge base template by adding, removing, and rearranging fields, or adding, modifying, and removing options for checkboxes, radio buttons, and dropdowns. Changes to the template will be applied to existing articles only when the article is edited and saved. When a group member edits an article that is based on a template that has been revised, they will see a message shown at the top of the article that says "The template for this article has been modified and may cause the article to display differently". When you edit a template that has at least one article created from it, you will see a message shown at the top of the template that says "Any changes made to this template will be applied to published articles once they are edited."

To edit a knowledge base template

1. Click *Knowledge Base* from the group navigation.
2. At the top of the page below the group name, click *Templates*.
3. Find the template you want to edit from the Templates list.
4. Click the dropdown to the right of the toggle and choose *Edit*.
5. Make your changes and then click *Publish*.
6. Enable or disable the toggle on the Templates page beside the template to control whether group members can select it to create knowledge base articles.

Delete a knowledge base template

Although you can a delete custom template, if there are published articles based on the template, the template cannot be deleted.

To delete a custom knowledge base template

1. Click *Knowledge Base* from the group navigation.
2. At the top of the page below the group name, click *Templates*.
3. Find the template you want to delete from the Templates list.
4. Click the dropdown to the right of the toggle and choose *Delete*.

5. On the confirmation dialog, click *Delete*. The template will be moved to the group trash folder.

7.5.1 Move a knowledge base article

As a group administrator, you can move a knowledge base article between groups.

The associated knowledge base template is copied to the destination group when:

- it does not already exist in the destination group.
- the template exists but it is edited in the destination group, and the administrator moves or copies an article based on the template from the source group to the destination group.

If the template exists in the destination group but is missing the edits made to it in the other group, the template will be updated with those edits.

During copy and move actions, any images and attachments in the article are copied to the root content folder of the destination group and are accessible to group members. The metadata also moves with the knowledge base article.

To move a knowledge base article

1. From the knowledge base article, go to the *More* dropdown and choose *Move*.
2. Choose the group that you want to move the article to.
3. Click *OK*. The page refreshes and you'll see the article in the destination group.

7.6 Convert a group type

As your organization changes, those changes can be reflected in groups by using the conversion feature. For example, if you created a group that is Public, but due to a pending acquisition now need to make that group Private, you can easily change the group type. You can also convert a private internal group to a private external group.

7.7 Extract zip to content

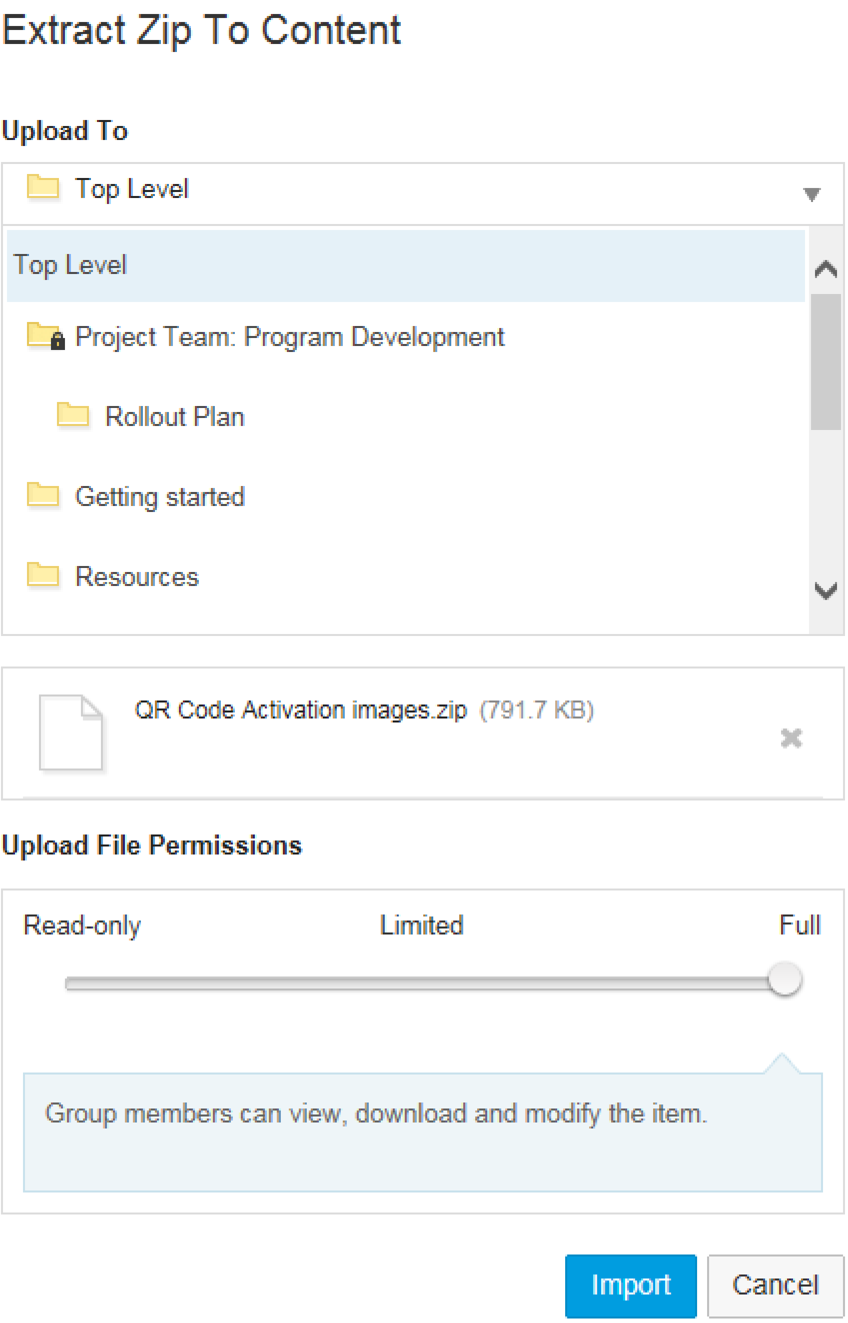
Your group may have a large volume of documents or content required for archiving purposes. If you are a group administrator, you can upload a zipped file containing such items into your group's content folder.

> **i Note**
>
> The following conditions should be observed:
>
> - File items in a single zipped file cannot exceed a maximum of 2000.
> - The size of the zip file cannot be larger than 2.14 GB.
> - The maximum number of nested folders is 9.

- To ensure that the extracted files, once uploaded, are not mangled, it is recommended that you use an up-to-date zip tool (for example, 7zip) to create the correct zip file.
- In the Parameters field for 7zip zipped files, you must enter "cu" to force UTF-8 filenames.

To extract zipped content to a group folder

1. Go to the group Admin menu and choose *Extract Zip to Content*.
2. Browse your local machine for the zip file you want to upload and extract. Click *Open*.
3. Choose the folder that you want to upload the content to, set the permissions on the file, and then click *Import*.



Extract Zip to Content dialog

4. A confirmation message appears; an email notification will be sent once the files are successfully uploaded. Click *OK* to dismiss the dialog.

7.8 Run group reports

If you are a group administrator, you will be able to access SAP Jam reports which display metrics on user contribution and activities, containing a maximum three months span of data per report. They can be downloaded as CSV files from the *Reports* tab in the Admin console. For more information on how to run a report, please refer to the SAP Jam Administrator Guide.

> **i Note**
>
> In the SAP Jam Admin console, when a group report is scheduled and generated, all other administrators for the same group will be able to view it. The same applies for company level reports; all other company administrators will be able to view that report.

Report metrics

Requested reports now display immediate metrics to help users determine whether they need to request another report or view the existing one from the list. For example, below each report title, the time frame for the report is indicated. To the left of the report, various icons show whether the report is scheduled to run (blue icon), completed (green icon), or encountered an issue after the request was submitted (red icon).

The following table lists the reports:

Report	Description
Activity Summary by Week or Month	Aggregated counts of content creation activities. This report can be run for the entire company, or a specific group.
Content Ranking Report	Lists all content items, their folder location, the type of content, number of times viewed, liked, and downloaded. It does not show the ranking for an entire company's content. The content rating average is also included.
Content Views Report (weekly) or Content Views Report (monthly)	Number of views per week or month for rich data content types (such as blogs, documents, links, photos, videos, and wiki pages).
Contribution Report by Object by Week or Month	Aggregated activity count for all items in SAP Jam such as comments made, groups created, photos and documents uploaded, and so on. This report includes activity in private groups.
Group Member Activity Report	List of members in each group, including the number of activities in the last 30 days.
Ideas Report	List of ideas submitted to the group ideas forum for a specified date range.
Tasks Report	List of group member tasks for a specified date range.
Terms of Use Compliance Report	Lists the users who have accepted the terms of use before participating in the group.
User Page Views Report (Weekly) or User Page Views Report (monthly)	List of users and the number of items they have viewed in a given time frame. This can be any item that has a view count (for example, documents, photos, and wikis). Only users who have viewed at least one item within the requested time frame are listed.

Report	Description
User Contribution by Week or Month	Number of objects a user has contributed per week or month.
User Contribution Activity Report	Aggregate of content contributed per user for a specified time range.
Purged Content Report	Displays purged items for all content types by user.

In SAP Jam, a group administrator can view and run the following reports within a group by clicking *Reports* from the group navigation. User level reports are available only when the "Allow User Level Report" is enabled under Features in the SAP Jam Admin console, and not restricted to company administrators.

Group and user level reports

Group level	User level
Activity Summary by Month	Group Member Activity
Activity Summary by Week	User Contribution Activity Report
Content Ranking Report	User Contribution Report by Month
Content Views by Month	User Contribution report by Week
Content Views by Week	User Page Views by Month
Contribution Report by Object by Month	User Page Views by Week
Contribution Report by Object by Week	
Idea Report	
Terms of Use Compliance	
Purged Content Report	

Generating report with multi-byte characters

You can view the content of CSV file by using Microsoft Excel's "Text Import wizard" and ensuring "65001: Unicode (UTF-8)" is selected from the "File origin" options. Please see https://support.office.com/en-us/article/Text-Import-Wizard-c5b02af6-fda1-4440-899f-f78bafe41857 for more information. For example:

1. Choose the "Delimited" option.
2. Begin import from row 2 if you see "sep=" in the preview. Otherwise, start from row 1.
3. Set File Origin to "65001: Unicode (UTF-8)".
4. Select "My data has headers" and then click **Next**.
5. Select "Comma" as the only delimiter and then click **Finish**.

7.8.1 Activity summary by week or month

This report shows a total count of content creation activities are listed by one column per week or month for the selected time period. You can use this report to help you determine which content item types are most popular amongst group members and which one are used less frequently. If designing group overview pages, you could use this information when featuring items in a content widget, or deciding which forum types make the most sense for your group's use. Please refer to the following table for a list of activities.

Activity summary by week or month details

Row item	Description
Blogs	The number of blogs created in the week or month, and a total for the entire period.
Comments	The number of comments made in the week or month, not including those in Discussions or Ideas, and a total for the entire period.
Discussion Comments	The number of comments made in discussions in each week or month, and a total for the entire period.
Discussions Created	The number of discussions created in each week or month, and a total for the entire period.
Document Annotations	The number of documents annotated in each week or month, and a total for the entire period.
Documents	The number of documents uploaded in the week or month, and a total for the entire period.
Idea Comments	The number of comments made in the week or month on ideas, and a total for the entire period.
Ideas Created	The number of ideas created in the week or month, and a total for the entire period.
Knowledge Base Articles	The number of knowledge base articles created in the week or month, and a total for the entire period.
Links	The number of links added in the week or month, and a total for the entire period.
Photos	The number of photos uploaded in the week or month, and a total for the entire period.
Polls	The number of polls created in the week or month, and a total for the entire period.
Questions Answered	The number of answers to forum questions added in the week or month, and a total for the entire period
Questions Created	The number of questions created in the week or month, and a total for the entire period.
Tasks Created	The number of tasks created in the week or month, and a total for the entire period
Videos	The number of videos created in the week or month, and a total for the entire period.
Wiki Pages	The number of wiki pages created in the week or month, and a total for the entire period.

7.8.2 Content ranking

This reports shows all content items that have been ranked. You can use this report to find out which content items are most popular based on ranking and which items are least favourable. Items that receive no rating might need to be featured more prominently or reconsidered for its relevance within the group. Please refer to the following table for a list of content ranking items.

Content ranking details

Row item	Description
Title	The title of the content item.
Location	The content folder where the content item is stored.
URL	Direct URL to the ranked content item.
Content Type	The type of content (for ewxample: wiki page, blog post, link, video, document, knowledge base article).
Views	The number of views for the content item.
Likes	The number of likes for the content item.
Rating	The average rating (between 0 and 5 stars).
Downloads	The number of times the content was downloaded.

7.8.3 Content views by week or month

This report shows the number of views per week or month for all content types. You can use this report to determine most popular to least popular content types. Please refer to the following table for a list of activities.

Content views by week or month details

Row item	Description
Blogs	The number of views of blogs for the indicated week or month, and total number for the entire period.
Discussions	The number of views of discussions for the indicated week or month, and total number for the entire period.
Documents	The number of views of documents for the indicated week or month, and total number for the entire period.
Ideas	The number of views of ideas for the indicated week or month, and total number for the entire period.

Row item	Description
Knowledge Base Articles	The number of views of knowledge base articles for the indicated week or month, and total number for the entire period.
Links	The number of views of links for the indicated week or month, and total number for the entire period.
Overview Pages	The number of views of overview pages for the indicated week or month, and total number for the entire period.
Photos	The number of views of photos for the indicated week or month, and total number for the entire period.
Questions	The number of views of questions for the indicated week or month, and total number for the entire period.
Videos	The number of views of videos for the indicated week or month, and total number for the entire period.
Wiki Pages	The views of wiki pages for the indicated week or month, and total number for the entire period.

7.8.4 Contribution by object week or month

This report shows the cumulative activity count by week or month in SAP Jam for the selected time period. You can determine which content type generated the most participation to the least participation in a group. Please refer to the following table for a list of content types.

Contribution by object by week or month details

Row item	Description
Blogs	The activity count in blogs for the indicated week or month, and a total for the entire period.
Comments	The activity count in comments for the indicated week or month, and a total for the entire period.
Discussions	The activity count in discussions for the indicated week or month, and a total for the entire period.
Documents	The activity count in documents for the indicated week or month, and a total for the entire period.
Ideas	The activity count in ideas for the indicated week or month, and a total for the entire period.
Questions	The activity count in questions for the indicated week or month, and a total for the entire period.
Knowledge Base Articles	The activity count in knowledge base articles for the indicated week or month, and a total for the entire period.

Row item	Description
Links	The activity count in links for the indicated week or month, and a total for the entire period.
Overview Pages	The activity count in overview pages for the indicated week or month, and a total for the entire period.
Photos	The activity count in photos for the indicated week or month, and a total for the entire period.
Polls	The activity count in polls for the indicated week or month, and a total for the entire period.
Poll Votes	The activity count in poll votes for the indicated week or month, and a total for the entire period.
Tasks	The activity count in tasks for the indicated week or month, and a total for the entire period.
Events	The activity count in events for the indicated week or month, and a total for the entire period.
Tags	The activity count in tags for the indicated week or month, and a total for the entire period.
Videos	The activity count in videos for the indicated week or month, and a total for the entire period.
Wikis	The activity count in wikis for the indicated week or month, and a total for the entire period.

7.8.5 Group member activity

This report lists total counts of user activity for a group. Please refer to the following table for a list of activities.

Activities can include interaction such as: content creation and updates; forum topic (questions, ideas, and discussions) creation, updates, and marked best answers; folder creation and updates; knowledge base article creation and updates; event creation and updates; custom event category creation and updates; task creation and updates; comments, replies, and sharing of feed updates; views, moving, and copying of content items; video playback; group export; group avatar updates; overview page creation and updates; link clicks.

> **i Note**
>
> Only the *Users*, *Select Report*, and *Group* options remain after this type of report is selected.

Group member activity details

Row item	Description
Group ID	The unique number identifier for the group within SAP Jam.
Group Name	The name of the group. **i Note** Non-Public groups will not show the group name unless *Include Private Group Details* is enabled in the *Features* tab of the SAP Jam Administration console.

Row item	Description
Group Type	The group type can be "Private", "Private Folder", "Cross Community", or "Public".
User ID	The user's ID. If you are not using SuccessFactors Platform, this entry will be blank.
User Email	The user's email address.
User First	The user's first name.
User Last	The user's last name.
User Status	The user's status (e.g., Active, Pending Approval).
Number of Activities in the last 30 days	The total number of the user's activities in the last 30 days for the specified group.
Date of Last post	The date and time of the user's last activity.
Total number of Activities	A total number of the user's activities since joining the group.
Group Admin	Indicates whether a user is also a group administrator.

7.8.6 Group member list

This report lists all the group members for a group. Please refer to the following table for a list of group member details.

Group member list details

Row item	Description
Email Address	The email address of the member.
First Name	The first name of the member.
Last Name	The last name of the member.
Status	Admin, Member, Invited, and Alumni indicates the current member status.
Joined	The date and time that the member joined the group.
Last Invited	The date of the last invitation sent to the member.
Added By	The name of the member who added this particular member to the group.
Invited Reminders	The number of invitation reminders sent to the member.
Following	Yes or No to indicate whether the member has opted to follow group updates.
Email Frequency	Immediately, Daily, Weekly, or No Emails can be indicated as the level of requested email frequency.

> **i Note**
>
> If the administrator disables the *Allow User Level Reporting* option in the Admin console, group administrators cannot view this report.

7.8.7 Ideas

This report displays all the ideas created by group members. Please refer to the following table for a list of idea attributes.

Ideas details

Row item	Description
Idea Title	The title of the idea.
Idea Content	The details of the idea from the content entry text box.
URL	Direct URL for the idea.
Vote Up	The number of votes in favor of the idea.
Vote Down	The number of votes against the idea.
Idea Status	The status of the idea (e.g., Submitted, Approved)
Created Time	When the idea was created.
Created By	The user who created the idea.
Last Update Time	When the idea was last updated.

7.8.8 Tasks

This report lists all group member tasks for a specified task creation date range. Please refer to the following table for a list of task details.

Task details

Section	Row item	Description
Task	Task ID	Unique identifier for the task.
Task	Task Title	The name of the task that's entered when adding a task.
Task	Task Description	A description of a task.

Section	Row item	Description
Task	URL	Direct URL for the task.
Task	Due Date	The date when the task is due for completion.
Task	Priority	Low, medium, or high.
Task	Tags	A hashtag for the task.
Task	Status	The overall status of the entire task: Open, In Progress, or Completed.
Task	Number of Fol-lowers	The number of group members indicated as task followers.
Task	Number of As-signees	The number of group members assigned to the task.
Task	Created Time	The time the task was created.
Task	Last Updated Time	The time the task was last updated.
Task	Created By	The group member who created the task.
Assignees	Assignee Name	The name of the group member that the task is assigned to.
Assignees	Assignee ID	The unique identifier of the assignee.
Assignees	Assignee Email	The email address of the assignee.
Assignees	Assignee Status	The status of the task for the assignee: Open, In Progress, or Completed.
Followers	Follower Name	The name of the task follower.
Followers	Follower ID	The unique identifier of the task follower.
Followers	Follower Email	The email address of the task follower.

i Note

If "Allow User Level Reporting / Dashboard" is not enabled by the administrator under the Feature Management options in the SAP Jam Admin console, the Created By, Assignee Name, Assignee Status and Follower Name will not appear in the report.

i Note

Assignees and followers are not listed when there are more than 100 people assigned to a given task.

7.8.9 Terms of use

This report lists which user have accepted the terms of use agreements. Please refer to the following table for a list of user details.

Terms of use details

Row item	Description
First Name	The first name of the user.
Last Name	The last name of the user.
Email Address	The email address of the user.
User ID	The user's ID number. If not set up in SuccessFactors Platform, this entry will be blank.
Accepted Time	The timestamp for when the user accepted the agreement.
Version	The version number for the Terms of Use accepted by the user. Versions are incrementally numbered as they are added.

7.8.10 User page views by week or month

This report displays each user with total counts of content items viewed for each week or month in the time period, and a total count for the entire time period. Only users who have viewed at least one item within the requested time frame are listed.

User page views by week or month details

Row item	Description
User ID	The user's ID number.
Email Address	The user's email address.
First Name	The user's first name.
Last Name	The user's last name.
Group Member	Yes or No to indicate whether the user is a group member.
(time period)	The total number of content views by the user in each week/month in the specified period.
Total	The total number of content views by the user in the entire specified period.

7.8.11 Purged content report

This report displays purged items for all content types by user. It lists the name of the group, requested time frame, title of the item, content type, folder location, when it was purged and the name of the user who purged the item.

Purged content for up to three month time span

Row item	Description
Title	The name of the purged item.
Content Type	Content types include forum topics (Questions, Ideas, Discussions), overview pages, wiki pages, blog posts, documents, photos, videos. **i Note** Deleted folders are not included as a content type and do not appear in this report.
Folder	The folder name.
Purged at	The date of the purge.
Purged by	The first and last name of the user who purged the item.
(Date Range)	Listed at the top of the report; time span for purged items

7.9 Dashboard

The success of a group can be in part based on the interaction levels of its group members. Access to immediate statistics on which group members are most active, what they are most engaged with, which content items received the most attention, and which items and members are the least engaging or engaged can help determine what the next steps are for improvement or merit. Group administrators can now click *Dashboard* on the group left side menu to view a usage dashboard that displays details for various activities within a group, from the previous four weeks to the previous 12 months.

> **i Note**
>
> - Alumni are excluded from Current Members, Current Email Subscribers, Most Engaged Members, and Most Engaging Items on the dashboard.

Before you work with the statistics and data that displays on your group dashboard, you'll need to select the time frames for the data.

To run your group dashboard

1. On the left side navigation for your group, click *Dashboard*.
2. When starting up the Dashboard for the first time,you may see a message stating that it's preparing to initialize. You can navigate away from the page and return to it later. Subsequent dashboard displays for your group will take less time to generate.
3. Once the dashboard is ready, and you happen to be on the same Dashboard page, click the *Click here to reload* link. Otherwise if you're navigating back from another page, just click *Dashboard* from the left side navigation.
4. Once the dashboard displays, you can refine the time frame for the data. On the *Dashboard time frame* drop-down menu, choose from:
    - Last 4 weeks
    - Last 3 months
    - Last 6 months
    - Last 12 months

   All tiles in the dashboard will immediately update to reflect the new data. When you navigate away from the page and then return to the Dashboard, it will show the data for the default time frame of 4 weeks.

   > **i Note**
   >
   > The time frame does not apply to the pie charts displayed within the detailed Membership graph.

> **i Note**
>
> For performance reasons, each group dashboard updates once every 24 hours.

To refresh the time frame on the group dashboard

1. On the Dashboard time frame section, select a time frame. The dashboard will be updated shortly.

Printer-friendly page view

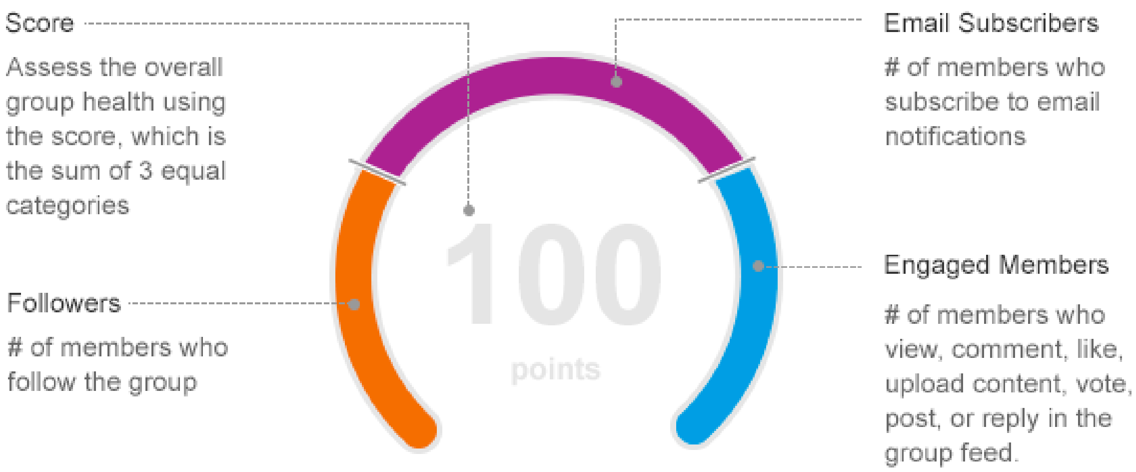
You can click *Print* to generate a print preview version of the dashboard. The dashboard can be printed in landscape or portrait formats. Individual graphs in their entirety exist on their own pages without getting cut off.

Download dashboard data

You can click *Download* beside the Print action to download a spreadsheet entitled "Group Dashboard.xsls". It contains multiple tabs of data for collaboration score, membership, most engaging items, and most engaged members data. In the downloaded file, you can see up to 200 most engaging items and 200 most engaged members.

7.9.1 Collaboration score tile

The collaboration score tile displays various scores averaged over the time frame selected.



Overall score

On the Overall tab, the overall score is visualized as a dial which is made up of three equal segments: follower score, email subscribers score, and engaged users score. Based on the historical time frame selected, a score is awarded to each individual category, and summarized in the table on the right.

Each category score is a value between 0 and 33.3, rounded to the nearest 0.1. The overall score is a value between 0 and 100, rounded to the nearest 1, and is the sum of the three category scores. An overall score rating is assigned based on the following: Fair (< 50 points), Good (>=50 and <70 points), Excellent (>=70 and <100), Perfect (100). The value change and percent change in score compared to the previous period also displays under the dial, where applicable.

To view a category for more details, click the category on the dial or click the category tab. You can also click *View Details* at the bottom of the tile to view the line graphs that visually represent the scores over time. See Collaboration score graph [page 132] for more details.

> **i Note**
>
> If the time frame selected covers a period prior to November, 2015 see Known limitations [page 135] .

Followers score

On the Followers tab, the followers score is based on the percentage of members who followed the group to receive regular updates in their home feed. It is computed as the average number of followers divided by the average number of members for the selected time frame, multiplied by 33.3.

A followers score is a value between 0 and 33.3, rounded to the nearest 0.1 It is assigned a rating based on the following: Fair (< 50% or 16.7 points), Good (>=50% or 16.7 points and <70% or 23.3 points), Excellent (>=70% or 23.3 points), or Perfect (100% or 33.3 points). Tips are offered to help an administrator improve the score.

Email subscribers score

On the Email subscribers tab, the email subscribers score is based on the percentage of members who subscribed to either immediate, daily, or weekly group email notifications. It is the average number of subscribers divided by the average number of members for the selected time frame, multiplied by 33.3.

An email subscribers score is a value between 0 and 33.3, rounded to the nearest 0.1 It is assigned a rating (Fair, Good, Excellent, Perfect) based on similar criteria as the follower score. Tips are offered to help an administrator improve the score.

> **i Note**
>
> If the time frame selected covers a period prior to May 29, 2016, see Known limitations [page 135].

Engaged users score

Engaged users score is awarded based on how much users interact with content in a group. It is computed as the average number of engaged users divided by the average number of members for the selected time frame, multiplied by 33.3. See Content and activities [page 134] for a list of activities that contribute to the score.

The score is a number between 0 and 33.3, rounded to the nearest 0.1.

> **i Note**
>
> In a public group, anyone can engage without becoming a member. Although it is possible to have more engaged users than members, the engaged users score is capped at 33.3.

The score is assigned a rating (i.e., Fair, Good, Excellent, Perfect) based on similar criteria as the followers score. Specific recommendations are offered to help an administrator improve the score.

7.9.2 Membership tile

The membership tile displays the average count of members, followers, email subscribers, and engaged users for a selected time frame. "Active" refers to any user who has logged into SAP Jam at least once since the company's instance of SAP Jam was created.

- **Members:** average number of active group members.
- **Followers:** average number of active group members who follow a group to receive regular updates in their home feed.
- **Email subscribers:** average number of active group members who subscribe to immediate, daily, or weekly group email notifications; members who do not specify a preference inherit the group setting by default.
- **Engaged users:** average number of active group members who interact with content in the group.

Click the *View Details* link at the bottom of the tile to view line graphs and pie charts that visually represent the metrics. See Membership graph [page 132] for more information.

> **i Note**
>
> The time frame period prior to the group creation is not included in calculation for averages. For example, if today's date is December 31, 2018, and the group was created on October 1, 2018, you could view an average count for the last three months. However, if you wanted to see an average for the last six months (as in, starting July 1, 2018), as no data would be available for July 1, 2018 through September 30, 2018, the average for the last 6 months would ignore the first 3 months of that 6 month period. That means the 3 month average for October 1, 2018 to December 31, 2018 would display.

7.9.3 Most engaged items tile

This tile displays a list of the top three most engaged items in the group, ranked by the total number of activities performed on them in a selected time frame.

Each item is assigned a value, which is the sum of views, comments, votes, likes, and uploads received from all members. Click *View Details* to see the full leaderboard. See Most engaged items leaderboard [page 133] for more information.

7.9.4 Most engaged members tile

This tile displays a list of the top three most engaged members in the group, ranked by the total number of activities they performed in the selected time frame.

Each member is assigned a value, which is the sum of views, comments, votes, likes, and uploads they performed on all content. Click *View Details* to see the full leaderboard. See Most engaged members leaderboard [page 133] for more information.

7.9.5 Collaboration score graph

The collaboration score graph displays group scores over the selected time frame.

It gives group administrators a quick way to identify any historical trends and take appropriate action. Scores are calculated at the end of each week (Saturday) and plotted. Hovering over each data point allows you to inspect the overall score for that week, and its breakdown of follower score, email subscribers score, and engaged users score.

Group administrators can choose to view the last 4 weeks, last 3 months, last 6 months, and last 12 months data.

> **i Note**
>
> For scores prior to May 29 2016, see Known limitations [page 135].

7.9.6 Membership graph

This graph displays the count of members, followers, email subscribers, and engaged users over a selected time frame.

Group administrators can choose to view the last 4 weeks, last 3 months, last 6 months, and last 12 months data. The graph gives group administrators an easy way to detect any trends or changes to the measures and take appropriate action. The values are captured at the end of each week (Saturday). Hovering over each date allows you to take a closer look at the values.

> **i Note**
>
> For email subscriber count prior to May 29 2016, see Known limitations [page 135].

Current member roles pie chart

This chart shows the make-up of current members by three categories: group administrators, group members, and external guests. Pending members are not included. The data shown is not controlled by the time frame selected. Hover your cursor over each segment of the chart to view the numbers.

Current email notifications pie chart

This chart shows the make-up of members who currently subscribe to none, immediate, daily, and weekly group email notifications. The data shown is not controlled by the selected time frame. Hover your cursor over each segment of the chart to view the numbers.

7.9.7 Most engaged items leaderboard

In the expanded Most engaged items table, the top 10 most engaged items are listed in order of total number of activities.

Each item is assigned a value, which is the sum of views, likes, comments, and uploads the item received from all group members in that time frame. The blue bar behind each item indicates its ranking relative to the leader, which is always assigned a full bar. Clicking on each item takes you to the item content page.

An option to filter by content type is included so you can refine the leaderboard display. The content types that appear in the drop-down filter depend on what content was uploaded, viewed, liked, and commented on within the selected time frame.

You can choose to exclude group administrators so that the calculation of the top 10 most engaging items for the selected time frame removes all group administrators' contributions.

> **i Note**
>
> - If the content item owner is also the group administrator, and you choose to exclude group administrators from the calculation (see the drop-down menu on the far right side of the expanded tile), that means that all group administrator contributions to that content item will be removed, while everyone else's contributions will still be part of the calculation.
> - Group overview page views are not factored into the calculation for most engaged items leaderboard.

7.9.8 Most engaged members leaderboard

The leaderboard shows the top 10 members ranked by the total number of activities for the time frame selected. It only displays when the user level reporting company setting is enabled in the SAP Jam Admin console.

Each member is assigned a value which is the sum of views, likes, comments, and uploads the member contributed to all items in the group in that time frame. The blue bar behind each member indicates their ranking relative to the leader, who is always depicted with a full bar. Clicking on each member takes you to the profile page for that member.

> **i Note**
>
> If comments have been made by a user in another group for a content item and that same item is moved to your group, those comments will also be moved to the comment wall for that content item in your group. As a result, that user from the other group will be counted as an engaged member within your group.

You can choose to exclude group administrators from the calculation of the top 10 most engaging members for the selected time frame.

> **i Note**
>
> If you choose to exclude group administrators from the calculation (see the drop-down menu on the far right side of the expanded tile), no group administrators will display in the leaderboard.

> **i Note**
>
> Group overview page views are not factored into the calculation for the most engaged items leaderboard.

7.9.9 Content and activities

The dashboard provides a measurement of engagement with content as defined by a specific list of activities.

Content

Group members can engage with the following content:

- documents
- wiki pages and blog posts
- images
- audio files
- video files
- decision-making tools (decision, poll, pro/con table, and ranking)
- planning tools (agenda, timeline)
- forums topics (questions, ideas, and discussions)
- events
- tasks
- extension tools (e.g., OpenSocial gadgets)
- business records
- knowledge base articles

Activities that contribute to scores

The following activities, which can be performed via the web application, SAP Jam mobile, or API, count towards the engaged users score:

- View content in a dialog box or single item view.
- View knowledge base articles.
- Post a new comment on content or knowledge base article.
- Reply to an existing comment.
- Like content, conversation, knowledge base articles, or annotations.
- Vote in poll, within the single item view or in the feed.
- Create new content or edit existing content.
- Update existing or upload a new document, video, knowledge base article, or image.

- Annotate a document.
- Post a new group wall comment, reply to an existing group wall conversation, or like any part of a group wall conversation.

Activities that are not included in scores

The following are examples of activities that do not contribute to an individual or group score:

- Browse "Feed Updates" section of group.
- View a list of inbox notifications that are sent from the group.
- View a conversation snippet in an Inbox conversation.
- View email notifications.
- View group overview pages.

7.9.10 Known limitations

The following notes provide details on the limitations for the Dashboard.

Unavailable historical values

Note 1: The number of email subscribers prior to **May 29, 2016** is not captured by the system. If you select a time frame that is earlier than this date, then:

- the count of email subscribers is not plotted on the membership graph prior to this date.
- the email subscriber score is assumed to be zero prior to this date; this causes the overall score to be lower than expected, because the calculation takes the zero score into account. For example, if on August 6th 2016, you select the last 6 months of data to display in the dashboard, then the email subscriber score will factor in zeroes for all of March, April, and up until May 28th, 2016 into its calculation.
- average count of email subscribers is computed based only on data that’s available after this date, and may skew the score as a higher or lower value. For example, if in the 2 weeks leading up to May 28th 2016 the number of email subscribers was 90, and in the 2 weeks following May 28th 2016 the number of email subscribers dropped to 70, the average for the 4-week period is 70 instead of 80.

Note 2: The number of members and followers **prior to November 2015** are not captured by the system. When you select a time frame that is earlier than this date, the dashboard will display values and calculate scores after this date.

Auto groups (now deprecated)

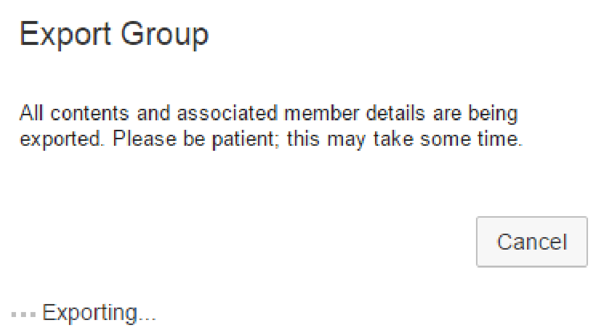
- The Collaboration score graph is unavailable.

- The Membership tile displays current values and is not affected by the selected time frame.
- The Collaboration score tile displays scores which are computed based on current values. For example, the follower score is computed as the current number of group followers divided by the current number of group members multiplied by 33.3.
- For auto groups that are converted to regular groups (due to auto groups feature deprecation), SAP Jam begins tracking weekly membership data after conversion. This means that the group historical graph will be empty as auto groups did not have the ability to capture historical values.

7.10 Export a group

Company administrators can maximize the storage space in their SAP Jam instance by exporting less frequently used groups. The export feature preserves the state of the group at export time, thereby allowing companies to remain compliant with various rules and laws concerning data retention.

This feature is only available to company administrators via the *Group Admin > Export Group* menu within each group. To enable this option in Group Admin menus, the company administrator must first enable Content Administration mode under *Compliance and Security*, which ensures that such activity is thoroughly monitored and reported in the activity logs.



Export group dialog

The file that gets generated when a group is exported is ZIP64 format, a 64-bit file type, and can be unzipped by the following tools:

- For Windows OS: Winzip, winrar, and 7-zip
- For Mac OS: The Unarchiver, available in the Apple app store

For Win7 customers the default unzip that ships with the operating system should work, but for Mac OS X users, the default unzip utility in the operating system does not work with ZIP64 files.

Groups are exported in a ZIP64 file format to support exporting large files, larger than 4 GB total uncompressed, and to support Unicode filename.

7.11 Export group member list

You can export a group member list from a group to sort and filter data in an external program.

To export a group member list in a csv file

1. Below the group avatar on the group overview page, click the number of members hyperlink to open the member list page.
2. Click *Download .csv*. When you open the csv file, you will see the member list with the following data: email address, first name, last name, status, join date, last invited date, number of invite reminders, yes or no to following, email frequency, and yes or no for external participant.

7.12 Delete a group

Group administrators can delete groups when they no longer serve a purpose, are redundant, etc.

> **i Note**
>
> Company administrators can also delete groups from the groups management listing in the Admin console.

To delete a group

1. Go to the group you want to delete.
2. Access the Group Admin [page 7] menu and choose *Delete Group*.
3. The Delete Confirmation window appears. Click *Confirm*. A deletion confirmation message appears.

The Group will be placed in your *Trash* items. To restore the group from your *Trash*, see Restore a group from your trash [page 137].

When deleting a group that has associated sub groups, a confirmation message informs you that the main group and its sub groups will be deleted.

> **i Note**
>
> Company administrators can restore deleted groups from your trash as long as you haven't purged the group yet. For more information see Access the trash of a group member to restore a deleted group in the SAP Jam Collaboration Administrator guide.

7.13 Restore a group from your trash

There may be an incident where you delete a group by accident. Or, you have deleted the group by request, but the requestor has changed their mind and requires the group again. To restore a deleted group that has not yet been purged, you can retrieve the group from your *Trash*.

> **i Note**
>
> Do not click Purge Items unless you want to permanently remove your deleted items. Once the items are purged, they cannot be retrieved.

To restore a group

1. On the icon toolbar on the top right of any page, click the Settings icon and select *Account*. The Account Settings page appears.
2. To see a list of your deleted items, select *Trash*.
3. To retrieve the group you deleted, click the box in front of the group's name.
4. Click *Restore Items*. The group and its content will be retrieved from your *Trash*.

> **i Note**
>
> Company administrators can restore deleted groups from your trash as long as you haven't purged the group yet. For more information see Access the trash of a group member to restore a deleted group in the SAP Jam Collaboration Administrator guide.

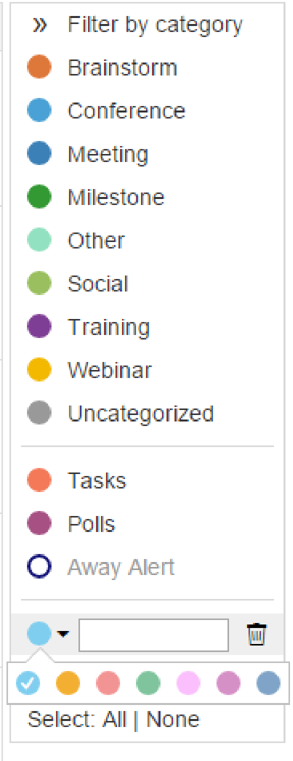
7.14 Add custom event categories

As a group administrator, you can now add up to five custom event categories that define the events that your group participates in. You can also modify and delete the custom event categories. Custom event categories can be exported to the calendar file extension format .ics so that it can be opened in applications such as Microsoft Outlook and Google Calendar.

Add a custom event category

To add a new custom category

1. From the group navigation, click *Events*.
2. On the color wand to the right of the calendar view, click **<<** to expand the wand.
3. Click *+ Add category*.
4. A custom category entry text box appears. You can choose from one of seven colors in the drop-down menu or accept the default color, and then enter a category name. Press **Enter** to save the name.



Event custom categories

If you need to make a name change, all new feed events will display the new category name. You can delete a custom category by clicking the Trash icon beside the category name.
When designing a group overview page with Event widgets, the custom categories will also display in the Category drop-down list when configuring the widget.

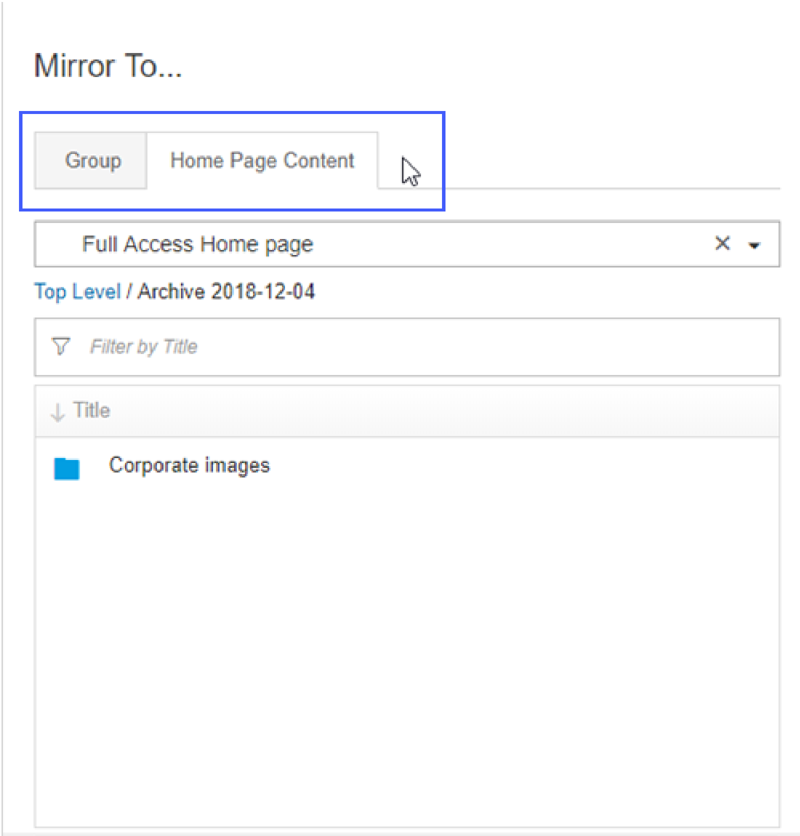
7.15 Mirrored content

As a group administrator, you can mirror content from your group to a home page repository.

Please refer to the Manage mirrored copies topic in the SAP Jam Collaboration User Guide for more information on what mirrors are and working with mirrored content.

To mirror a content item from a group to a home page repository

1. Go to the item you want to mirror and select the *Mirror* action from the dropdown.
2. Click *+ Mirror* from the Mirror To dialog.
3. Choose the Home Page Content tab and select the company or admin area you want to mirror to.
4. Choose the repository folder then click *Select Folder*.
5. If you need to change the mirror permissions, click *Options* on the Mirror To dialog. Mirror permissions can be set for each content item.



Mirror from group to home page

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