Ecosystem Administrator Guide

Ecosystem Administrator Guide

Document Publication Date: October 7, 2011

Copyright © 2009-2011 BroadVision, Inc., 1600 Seaport Boulevard, Suite 550, North Building, Redwood City, California 94063, U.S.A. All rights reserved.

The software and accompanying written materials are protected by U.S. and International copyright law. Unauthorized copying of the software, including software that has been modified, merged, or included with other software, or other written material is expressly forbidden. This software is provided under the terms of a license between BroadVision and the recipient, and its use is subject to the terms of that license. Recipient may be held legally responsible for any copyright infringement that is caused or incurred by recipient's failure to abide by the terms of the license agreement.

RESTRICTED RIGHTS LEGEND: Terms and Conditions Applicable to Federal Governmental End Users. BroadVision licenses products for ultimate end use by federal government agencies and other federal government customers ("federal government customers") only under the following conditions. Software and technical data rights in these products include only those rights customarily provided to end use customers of Software as defined in the BroadVision Master Software License and Services Agreement and any exhibit thereto. This customary commercial license in technical data and software is provided in accordance with FAR 12.211 (Technical Data) and 12.212 (Computer Software) and, for Department of Defense purchases, DFAR 252.227-7015 (Technical Data - Commercial Items) and DFAR 227.7202-3 (Rights in Commercial Computer Software or Computer Software Documentation). If a federal government or other public sector customer has a need for rights not conveyed under these terms, it must negotiate with BroadVision to determine if there are acceptable terms for transferring such rights, and a mutually acceptable written agreement specifically conveying such rights must be executed by both parties.

The product described in this manual may be protected by one or more U.S. and International patents. Certain applications of BroadVision One-To-One® software are covered by U.S. patent 5,710,887.

DISCLAIMER: BroadVision, Inc., makes no representations or warranties with respect to the contents or use of this publication. Further, BroadVision, Inc., reserves the right to revise this publication and to make changes in its contents at any time, without obligation to notify any person or entity of such revisions or changes.

TRADEMARKS: BroadVision is a trademark or registered trademark of BroadVision, Inc., in the United States, the European Community, and in other countries. Clearvale is a trademark of BroadVision, Inc., in the United States and other countries.

All other trademarks, service marks, and trade names belong to their respective owners. BroadVision, Inc., disclaims any proprietary interest in the marks and names of others.

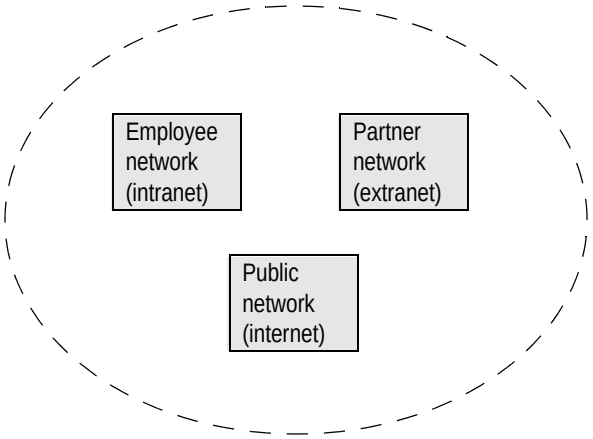
Contents

1 Managing Your Clearvale Ecosystem 5

Using the Ecosystem Administrative Console 6
Adding Networks to Your Ecosystem 7
Adding Ecosystem Members 8
Managing Ecosystem Members 10
Adding Ecosystem Administrators 11
Sharing Content In an Ecosystem 11
Searching Across an Ecosystem 11
Troubleshooting an Ecosystem 12

1 Managing Your Clearvale Ecosystem

This document talks about managing multiple Clearvale networks using an ecosystem. An ecosystem is a collection of related networks that you can easily manage with an administrative console. A typical ecosystem might be comprised of the following networks:



Typical ecosystem

The benefits of using an ecosystem are that if you have an overlapping of users in these networks, the users can maintain their profile in one network. The updated profile is shared with all networks in the ecosystem of which they are a member.

Another benefit is that network members can easily share files and blogs across networks within the ecosystem. For example, if a Product Manager writes a blog announcing a new product, they might want to publish it to all three networks shown in the above diagram. Using an ecosystem, it is easy to publish on one network and share with many networks.

Ecosystems are available from BroadVision as part of the Clearvale Enterprise package. If you plan to use ecosystems, contact BroadVision for access to your ecosystem administrative console.

Using the Ecosystem Administrative Console

When you purchase the Clearvale Enterprise package, BroadVision provides an ecosystem admin console. Use the console to perform the ecosystem tasks described in this chapter.

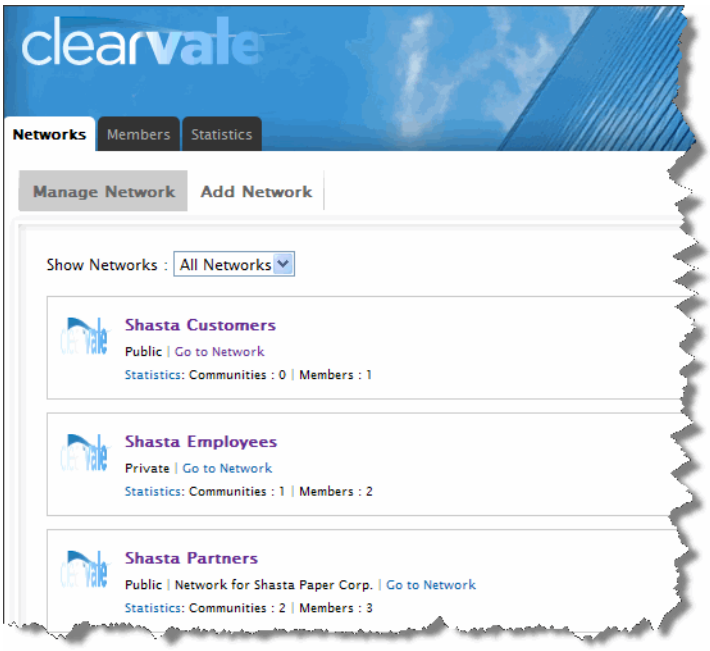
To log into your ecosystem admin console

1. Check your email for a message from Clearvale that includes the link to your ecosystem admin console.
2. Click the link to access your ecosystem admin console.

   If you requested additional authentication, you will see the Authentication Requested popup window. If you see this popup window, enter the user name and password that you received from BroadVision and click **OK**. The Login to Ecosystem page then appears.

   If you did not request the additional authentication, you will immediately see the Login to Ecosystem page.
3. Enter your Clearvale login name and password.

   The ecosystem admin console appears.



This image shows the ecosystem admin console with some networks added to it.

Adding Networks to Your Ecosystem

When you first log into your ecosystem admin console you will not have any networks within it. You can start by adding a single network and then adding more networks over time. Or, if you know the exact networks that you need, go ahead and create them now.

IMPORTANT:

- Add networks before adding ecosystem members so that you can assign members to specific networks when you add members.
- Any existing networks that you have prior to creating an ecosystem cannot be added to your ecosystem.

To add a network to your ecosystem

1. Select **Networks>Add Network**.
2. Add a network name and description.

   The description is optional and appears beneath your network name.
3. Add an email address to associate with the network.
4. Add the URL for your network.

   This cannot be changed.
5. Choose a default language for your network.
6. Select the time to send the daily email digest of network notifications to network members.
7. Choose your Network Access settings by using the check boxes and radio buttons:
   - Check **Allow unregistered visitors to access your network and view public information** if you want to allow guest visitors to see content on your network.
   - Check **Unrestricted Email Domains** for public networks. This allows members with any email address to join your network. Note that optionally you can specify email domains that are prohibited from accessing your network.
   - Check **Restricted Email Domains** for a private network. This allows only members with specific email addresses to join your network. Specify the email domains that are allowed to access your network.

8. Check **Disable Sharing** if necessary.

   By default any content on a network in an ecosystem can be shared with other networks in the ecosystem. If you do not want this network's content to be shared between networks, check the disable box. (If the box is already selected and you cannot deselect, that means that the ecosystem does not allow sharing between any networks within it.)

9. Choose **Joining & Invitations** settings.

   These settings indicate whether or not unregistered people can join your network without an invitation and also who can invite people to the network.

10. Indicate whether or not content items show on the home page by default.

    If set to **No**, administrators must manually approve of content before it displays on the Network page.

11. Click **Save**.

Adding Ecosystem Members

Initially, your ecosystem will have one member—yourself. Once you have created at least one network in your ecosystem, you can start inviting members to your ecosystem. You should invite members that you want to access one or more of the networks in the ecosystem.

After you invite the new ecosystem members, they appear in your ecosystem and are referred to by their email address.The new member should check their email inbox for a message from Clearvale. The message contains a link where they can finish setting up their user profile, including specifying a password and adding their first and last names.

TIP: Clearvale does not prevent you from inviting members by using the **Invite Members** tab in a network that is part of an ecosystem. Note, however, that any member invited through a network, as opposed to invited through the ecosystem admin console, is only a member of that particular network. They cannot share files, blogs, or profile information across ecosystem networks.

To invite individual members

1. From the ecosystem console, select **Members>Add Members**.

2. Click **Individual**.

3. Enter the email addresses of the people you want to invite, separating each with a comma or carriage return.

4. Use the check boxes to indicate the networks to which you want the people to belong. Also use the drop-down menu to select the role for the member.

5. Click **Add Members**.

   The members that you invited receive an email notifying them of their membership and requesting that they finish setting up their account.

To send invitations to a large group

1. From the ecosystem console, select **Members>Add Members**.
2. Click **Bulk Import**.
3. Browse to a .csv or .txt file that contains the emails of people you want to invite.

   Clearvale provides a sample file that shows how to organize your upload file. Basically, use a separate line for each new member. Separate the values for each member with commas (in a text file) or new columns (in an Excel file). Include the following for each member: email, first name, last name, network::role. To assign a member to multiple networks with different roles in each network, use network-a::role,network-b::role.
4. Click **Upload**.

   The members that you invited receive an email notifying them of their membership and requesting that they finish setting up their account.

Reminding members to log in

If you find that you have invited members to your ecosystem but that they have not logged in yet, you might want to resend their invitation.

To reinvite members to the ecosytem

1. From the ecosystem console, select **Members>Manage Members**.
2. Click **Reinvite** next to the member to resend the email notification.

   The member will immediately receive another email notifying them of their membership and requesting that they finish setting up their account.

Managing Ecosystem Members

To manage the members of the network, select **Members>Manage Members**. You can:

- Search for a particular member by typing their first or last name. You can use the * wildcard in the search. Note that if the member has not fully joined the ecosystem, you will not be able to find them because they haven't specified their first or last name.
- Use the **Show All** link for the member to see the networks within the ecosystem to which the member belongs.
- Use the **Manage** link to perform tasks pertaining to the member:
  - View the member's profile.
  - View the member's profile picture.
  - View the member's roles for each network and update the roles if you like.
  - Add the member to another network.
  - View recent activity by the member.
- Use the **Reinvite** link to reinvite the member to the network. See "Reminding members to log in" on page 9.

To give an ecosystem member access to another network

1. From the ecosystem console, select **Members>Manage Members**.

   The Members page appears. By default, it lists the members of all networks in the ecosystem.

2. Find the person to add as a member to a network and click the **Manage** link.

   The Membership & Roles page appears for this user. All the networks in the ecosystem are listed.

3. Click **Add to Network** under the network to which you want to add the person.

   The person is added to the network and is assigned the default role for new members, either Writer or Reader.

4. If necessary, change the role for the new network member.

5. If you want to add the person to another network, repeat Step 3 and Step 4.

   When you give a member access to a new network, they receive an email that informs them of their membership and provides them with the network URL.

Adding Ecosystem Administrators

You may want more than one ecosystem administrator. Adding a person as ecosystem administrator does not automatically make that person a network member or administrator of any of the individual networks. The person must be added to selected networks.

To add another ecosystem administrator

1. Select **Members>Add Ecosystem Admin**.
2. Enter the person's first and last name.
3. Enter the person's email address.
4. Click **Register**.

   The person will receive an email invitation to the ecosystem.

Sharing Content In an Ecosystem

You can share the following content among networks within your ecosystem:

- Files, including documents, images, videos, and so on
- Blog posts

You set sharing preferences when you upload a file or create a blog post. You can share files and blog posts with:

- One or more networks in your ecosystem.
- One or more communities within the networks in your ecosystem.
- Another network member.
- Some combination of the above.

Searching Across an Ecosystem

When you search for content in a network that is part of an ecosystem, the files and blog posts that are visible to you in other networks within the ecosystem are also searched.

Troubleshooting an Ecosystem

I can’t share files or blogs with a network in my ecosystem

- Make sure that the network with which you want to share is part of your ecosystem.
- Make sure that sharing is enabled for the particular network within your ecosystem with which you want to share. To check the sharing setting for a network, in the ecosystem admin console, click **Networks** to display the networks in your ecosystem and then click on the network name. Scroll down to the Sharing settings and make sure sharing is not disabled for that network. If necessary, uncheck the **Disable** setting.
- If you still can’t share, make sure that you know where to set sharing preferences. Find the file or blog that you want to share and click **Edit**. Scroll down on the Edit File or Edit Blog page to the Sharing area. This is where you set sharing preferences for a file or blog. Be sure to save your changes.

I have an existing network that I want to add to my ecosystem

- You cannot add an existing network to an ecosystem. You can only add new networks that you create after setting up your ecosystem.

I want to duplicate a network within my ecosytem by using the clone feature

- Cloning is not supported within an ecosystem. This means that you cannot clone individual networks within your ecosystem, and you cannot clone your entire ecosystem.