

# System Administrators' Guide

If you're a system administrator, use this guide to set up and configure Clearspace using the admin console.

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This guide includes information about console features that are only available to system administrators. Some Clearspace administration features are covered in more detail in other documentation, while others are available to space administrators and user/group administrators as well as to system administrators. For information on those features, look to the following:

| Document  | System Admin | Space Admin | User/Group Admin |
|---|--------------|-------------|------------------|
| <i>Managing Spaces</i>                            | ✓            | ✓           |                  |
| <i>Managing Permissions</i>                       | ✓            | ✓           |                  |
| <i>Managing Users and Groups</i>                  | ✓            |             | ✓                |
| <i>LDAP and Active Directory Guide</i>            | ✓            |             |                  |
| <i>Fine-Tuning Clearspace Performance</i>         | ✓            |             |                  |
| <i>Clearspace Clustering Information</i>          | ✓            |             |                  |
| <i>Customizing UI the Basic Way</i>               | ✓            | ✓           |                  |
| <i>Customizing UI with the Theme Resource Kit</i> | ✓            | ✓           |                  |
| <i>Advanced Theming Topics</i>                    | ✓            |             |                  |

|  |   |  |  |
|--|---|--|--|
| <i>Clearspace Upgrade and Migration Guide</i>              | ✓ |  |  |
| <i>Using Community Everywhere</i>                          | ✓ |  |  |
| <i>Localizing Clearspace</i>                               | ✓ |  |  |
| <i>Recommended Environments for Clearspace Deployments</i> | ✓ |  |  |

**Note:** This guide assumes you've already installed Clearspace, so it does not describe installation procedures. Please refer to the *Clearspace Installation Guide* and see *Recommended Environments for Clearspace Deployments*.

*Fine-Tuning Clearspace Performance*— Once you get Clearspace up and running, you'll need this to get the best performance from the start. This guide is included with the Clearspace documentation.

## Before You Get Started

Be sure to check out the *README.html* included with the documentation. There you'll find basic instructions for getting started (from installing Java to starting your application server to running Clearspace), known issues, and a link to the license agreement.

For the most part, this guide assumes you've already installed Clearspace. If you're looking for information on installing, see the *Clearspace Installation Guide*.

## Administration Console

You can use the Clearspace Admin Console to manage system settings, permissions, content (documents, discussions, and blogs), and people. This guide describes those things that only a system administrator can do in the admin console.

You can start the admin console from the command line.

- To view the console from the command line, make sure Clearspace is running, then go to a URL of the following form:

```
http://<hostname>:<portnumber>/<context>/admin
```

By default, using the built-in application server, this URL is:

```
http://localhost:8080/clearspace/admin
```

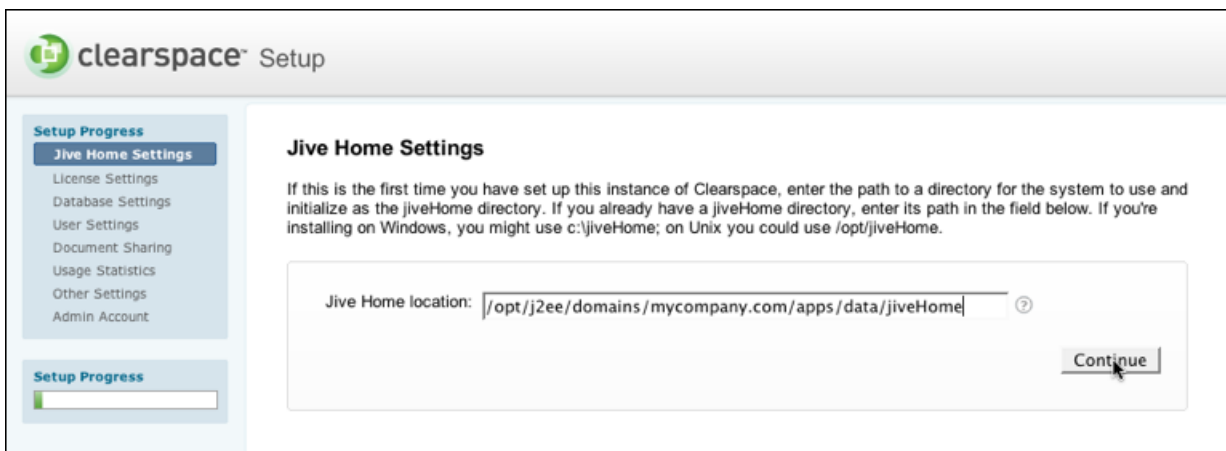
- To view the console from the service manager, click the Clearspace icon in the Start menu, desktop, or task bar, then Launch Admin.

## Setting Up Clearspace

The first time you navigate to a page in the administration console, you'll be prompted to set up Clearspace using the setup tool. This tool assumes that you've either already set up a database for use with Clearspace, or that you're going to use the evaluation database. This section briefly describes the setup tool.

**Note:** The setup tool runs only once. If you need to re-run it, open the `jiveHome/jive_startup.xml` file, find the line `<setup>true</setup>`, and change the `true` value to `false`. Restart your application server, point your browser at Clearspace using the URL above and rerun the setup tool.

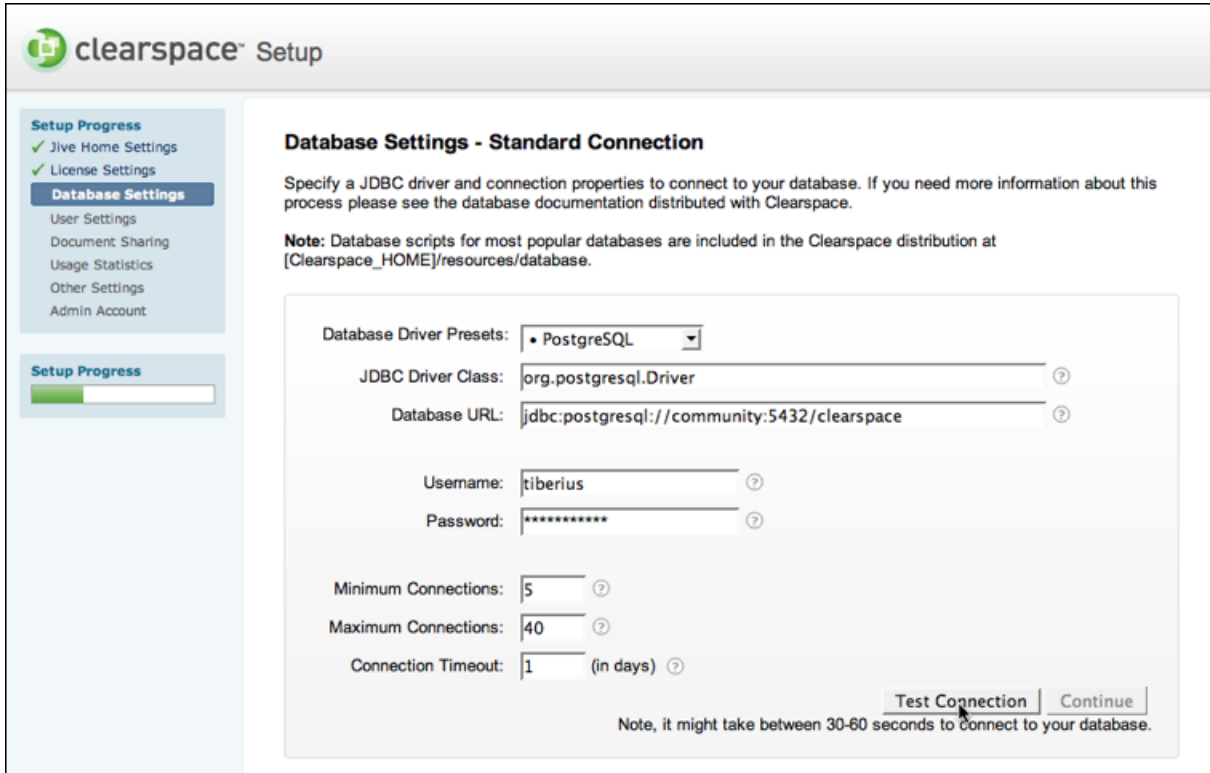
**Jive Home Settings**— The first page of the setup tool prompts you to specify the location of your jiveHome directory. Confirm the location of the jiveHome directory (by default this is at the root of the distribution). The jiveHome directory contains configuration files, logs, data (for the evaluation database) and other items that Clearspace needs to run correctly.



The screenshot shows the 'clearspace Setup' interface. On the left, there is a 'Setup Progress' sidebar with a list of settings: 'Jive Home Settings' (highlighted), 'License Settings', 'Database Settings', 'User Settings', 'Document Sharing', 'Usage Statistics', 'Other Settings', and 'Admin Account'. Below this is a progress bar. The main content area is titled 'Jive Home Settings' and contains the following text: 'If this is the first time you have set up this instance of Clearspace, enter the path to a directory for the system to use and initialize as the jiveHome directory. If you already have a jiveHome directory, enter its path in the field below. If you're installing on Windows, you might use `c:\jiveHome`; on Unix you could use `/opt/jiveHome`.' Below the text is a text input field with the value `/opt/j2ee/domains/mycompany.com/apps/data/jiveHome` and a question mark icon. To the right of the input field is a 'Continue' button.

**License Settings**— Enter the license key you purchased (you can retrieve your purchased keys by logging into [www.jivesoftware.com](http://www.jivesoftware.com)) or click continue to accept the evaluation license.

**Database Settings**— Specify how to connect to the Clearspace database. You can use the evaluation database that is included with Clearspace or you can choose an external database. If you choose the standard database connection or JNDI datasource, you'll be prompted for required settings after you click Continue. Here's an example of a standard connection configuration:



See the *Clearspace Installation Guide* for information on supported databases and connection values to use.

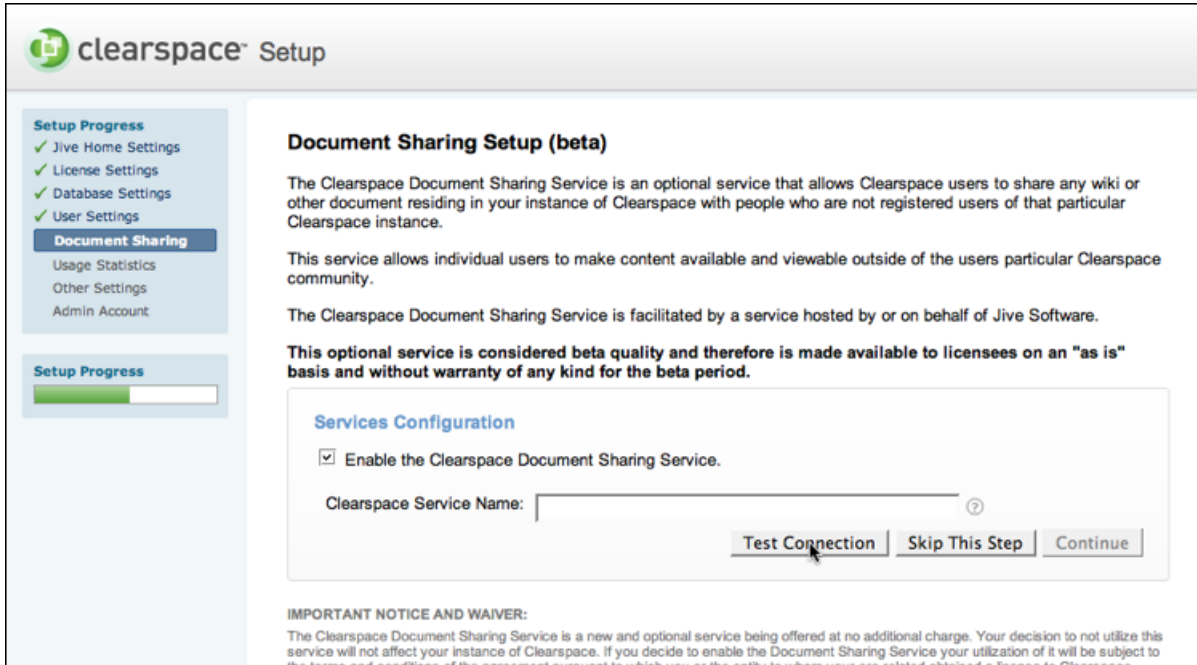
**Note:** The evaluation database isn't recommended for production use.

**User Settings**— Specify the system Clearspace should use for user and group data. For the **Default** option, the setup tool will use the user and group database tables from the Clearspace database. For the LDAP option, you'll be prompted to enter information for your LDAP server (such as host, base distinguished name (DN), and so on). Be sure to see *Clearspace LDAP and Active Directory Guide* for details on setting up an LDAP or Active Directory connection.

For the **Custom** option, you'll be prompted to give the names of your implementations of interfaces from the Jive Software API (such as `com.jivesoftware.base.UserManager`) for user system access.

**Document Sharing** — Choose whether to enable your Clearspace site's connection with the document sharing service. In the Clearspace Service Name box, simply enter the name you would like to have represent your Clearspace site. This is the name that people using the service will see (note that people using the service might have access to content from Clearspace sites other than yours). One choice might be the name your site's root space will use.

**Note:** Be sure to read the waiver notice at the bottom of the page.



**Usage Statistics**— Choose whether to allow Clearspace to send usage statistics back to Jive Software. For more information see [Sending Usage Statistics](#) (page 15) .

**Other Settings**— Specify defaults for feeds (such as RSS) and email sent and received by Clearspace. Clearspace can send email when a account is created for a new user, for email notifications, and so on. Specify the "From" name and email address that should be used in these emails, as well as the SMTP host and port that should be used. Clearspace can also be configured to receive email, such as when a user posts a discussion response via email. To get these emails, Clearspace needs a client account; specify those details here.

You'll be able to change these settings later via the admin console.

**Admin Account**— Specify the system administrator's name, email, and password. Be sure to change the admin email password from the default value, which is "admin".

After you've completed the setup tool, you'll be prompted to start the administration console. Enter the user name and password you specified in the setup tool's Admin Account page.

## Getting Basic System Information

You can get basic, system-wide information about the deployment context for Clearspace from the admin console. Use this information when requesting support.

## Root Space

You can change the name and description for the root space.

Admin Console: System > Settings > Space

## Deployment Environment

You'll find information about the environment into which Clearspace is deployed in the admin console. This information includes the Java environment (JVM version and Java system properties), operating system, uptime, and user, group, and authorization managers in use. It also includes information about the data source.

Admin Console: System > Management > System Information

## Deployment License

The admin console lists the license type, capacity, current usage (how many of your allowed capacity is being used), number of cluster members, and license creation and expiration dates. Click Upgrade License to display a box into which you can paste your license key.

Admin Console: System > Management > License Information

## Locale

You can set default locale, time zone, and character set for the site. Note that this is a global default setting that can be overridden by three other settings. The precedence hierarchy is listed here, with the first given the highest precedence:

1. Locale chosen in user preferences.
2. Locale set for the user's browser.
3. Locale set at the space/community (in Spaces > Settings > Space Settings).
4. Locale set at the global level (in System > Management > Locale).

Admin Console: System > Management > Locale

## Getting Data Into Clearspace

With a fresh Clearspace site, you can migrate data from a database that's serving another Clearspace site. Note that you can only migrate to an *empty* Clearspace database.

Clearspace provides a migration tool through which you can copy data from one database management system (DBMS) to another. The destination system you're copying into *must* be empty before you use the tool or migration will fail.

If you're considering migrating, be sure to read *Migrating from One DBMS to Another* in the Clearspace Upgrade and Migration Guide.

Admin Console: System > Database Migration > Database Migration

## Configuring Document Sharing

Enable document sharing to provide people using Clearspace with a link through which they can share a document with people outside Clearspace. With the service enabled, people will be able to invite guests by email. Clearspace will present shared documents through a URL to the service, where guests will be able to create an account and view or comment the document.

The document also supports email notifications when there are changes to the document's content or its comments (you currently can't edit the template for notifications sent by the document sharing service).

Admin Console: System > Management > Document Sharing

**Note:** Document sharing is still a beta feature.

## Configuring Clearspace Email

Clearspace can send email for notifications, welcome messages, and so on. It can also receive messages, such as for creating a discussion post from an email sent to Clearspace. For sent messages, you can tailor the form of automatic emails by editing the email templates that are provided for each of these emails.

Note: You can also set up a connection between Clearspace and an email server so that actual email content is synchronized with and displayed as content in a space. For more information see [Synchronizing Content with Email or Newsgroups](#) (page 26) .

## Connecting to Email Servers

Clearspace uses an SMTP email server for sending messages such as content update notifications, task reminders, registration confirmations, and so on. It uses a POP3 or IMAP server for receiving messages, such as for creating a discussion post from an email sent to Clearspace.

With configuration settings for your email servers in hand (host name, port, login credentials, and so on), you can set up and test a connection to the servers from the Clearspace admin console. After you change server settings you'll need to restart the application server in order for them to take effect.

To handle outgoing emails that bounce, use the Bounce Email Address field to enter the email address on your email server that should receive the messages that bounced (you might need to create an email account on your server if you don't have one already). You should check that account occasionally and possibly remove from Clearspace the email addresses that bounced.

Admin Console: System > Settings > Email Server

## Managing Email Templates

Clearspace includes a set of templates to shape the content of emails it sends to people in response to certain events. For each of these, you can edit template content, change template locale, and add new templates for use in other locales.

The templates cover a wide range of actions in Clearspace. Some of these are very common, such as watch notifications sent when content is changed or added (for blogs, documents, spaces, and so on) or when someone requests a reset of their password. Others are sent for actions or events that are more rare. You'll find a complete template list in the Clearspace admin console.

**Note:** You configure other specific aspects of Clearspace email in other parts of the admin console. For example, you set whether moderation email should be sent at all on the Discussions settings pages (see [Configuring Discussions Options](#) (page 17) ).

When you're editing templates, you use the syntax of [FreeMarker](#), the technology used to render most of the Clearspace user interface. Also, each template supports a specific set of tokens to hold the place of email content that will vary from message to message. For example, the notification email sent to those watching a document includes tokens for the document that's being watched, the person subscribed for notification, and the URL of the document they're watching. In the template text you refer to tokens in the FreeMaker way: `${document}`,

`${user}`, `${docURL}`, and so on. Here's an example designed to tell the receiving user that a document they're watching has been updated:

```
${SkinUtils.getDisplayName(user)}, The document "${document.subject}",  
was updated ${JiveGlobals.formatDate(document.modificationDate)}  
<#if versionAuthor?exists>by ${SkinUtils.getDisplayName(versionAuthor)}.</#if>  
To view the document, visit: ${docURL}
```

This template gets the name of the subscribing person and addresses them, then gives the document title, updated date and URL. If the person who updated the document is still in the system, then their name is given also.

Note that the token syntax requires the dollar sign and curly braces; parentheses and square brackets, for example, won't work here. When you're editing a template, the admin console will display the tokens you can use in it.

Admin Console: System > Settings > Email Templates

## Enabling Integration with Openfire

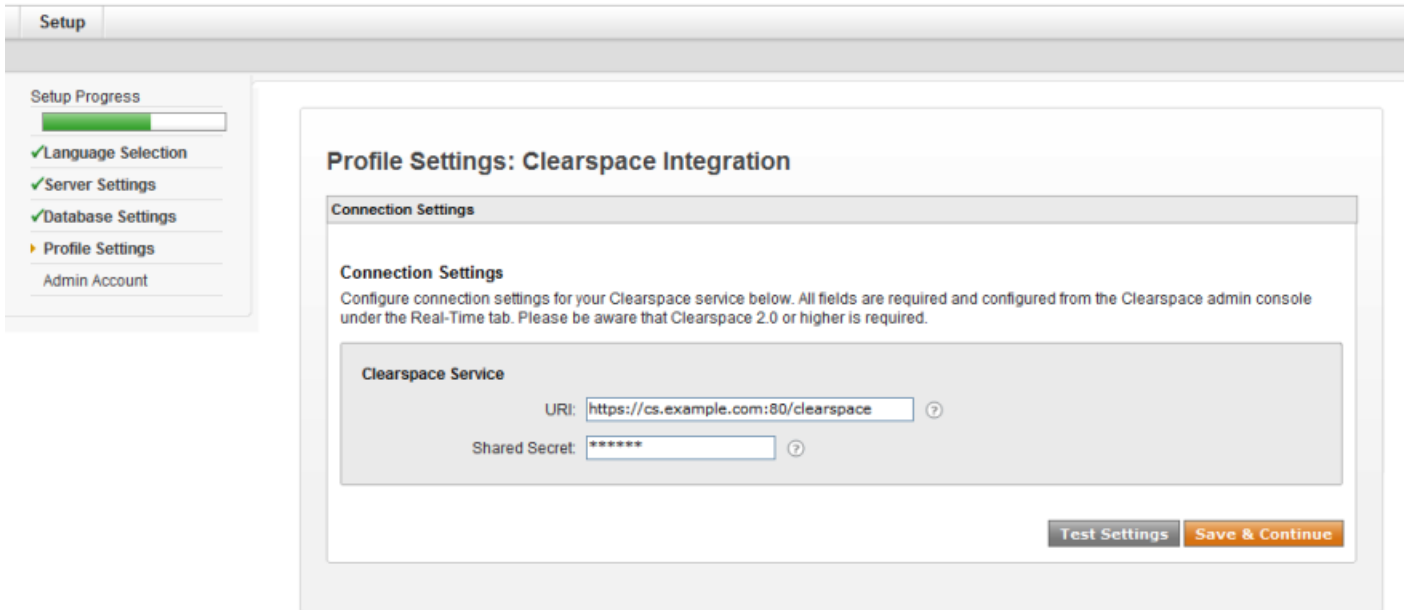
By integrating Clearspace with your Openfire instance, you can create a connection in which IM presence information is visible in Clearspace. In other words, with Clearspace and Openfire aware of each other, a person "Available" via IM will appear so in Clearspace. To integrate the two, you'll need Clearspace version 2.0 or higher and Openfire version 3.5.0 or higher.

Also, if you want Openfire to use Clearspace as its source of user data, you'll need to have REST-style web service enabled in Clearspace. When you use the Clearspace admin console to create the connection between Clearspace and Openfire, the console will automatically enable REST-style services. Note that this web service access will be enabled for *all* registered users (technically, Openfire is represented in Clearspace as a registered user). You can't have Openfire integration without enabling access to Clearspace via REST.

Configuring the Clearspace/Openfire connection requires that you make specific settings to both Openfire and Clearspace, as described below.

In the Openfire setup tool, on the **Profile Settings** page, select Clearspace Integration to use as the user and group system to use. On the **Profile Settings: Clearspace Integration** page, enter the location where Openfire can find Clearspace via REST web services and the shared secret they'll both use. (If you get through the setup tool and decide to change this setting later, you can make the change in the Openfire admin console on the Server > Server Settings > Profile Settings page.)

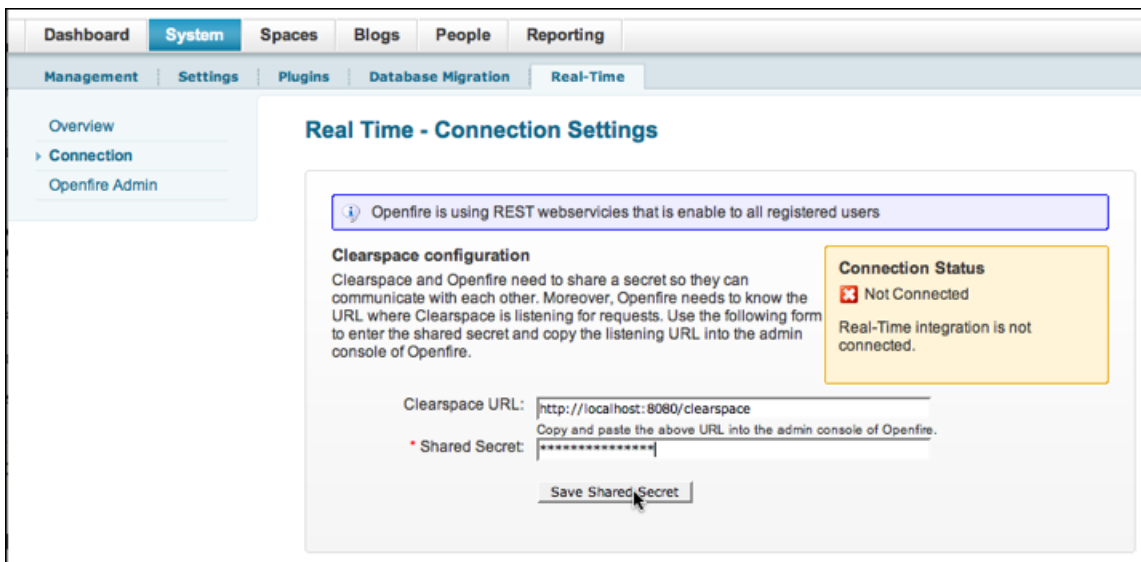




The screenshot shows the Openfire Setup interface. On the left, a 'Setup Progress' sidebar lists: Language Selection (checked), Server Settings (checked), Database Settings (checked), Profile Settings (selected), and Admin Account. The main content area is titled 'Profile Settings: Clearspace Integration'. It features a 'Connection Settings' section with a sub-section 'Clearspace Service'. The 'URI' field contains 'https://cs.example.com:80/clearspace' and the 'Shared Secret' field contains '\*\*\*\*\*'. At the bottom right of the form are two buttons: 'Test Settings' and 'Save & Continue'.

Built by [Jive Software](#) and the [IgniteRealtime.org](#) community

On the **Real Time - Connection Settings** page, enter the URL at which Openfire can reach your Clearspace instance. In the **Shared Secret** box, enter the shared secret that you entered when configuring Openfire. Click **Save Shared Secret** to create the connection.



The screenshot shows the Openfire Admin Console. The top navigation bar includes 'Dashboard', 'System' (selected), 'Spaces', 'Blogs', 'People', and 'Reporting'. Below this, a sub-navigation bar includes 'Management', 'Settings', 'Plugins', 'Database Migration', and 'Real-Time' (selected). The left sidebar shows 'Overview', 'Connection' (selected), and 'Openfire Admin'. The main content area is titled 'Real Time - Connection Settings'. It contains an information box stating 'Openfire is using REST webservices that is enable to all registered users'. Below this is the 'Clearspace configuration' section, which includes instructions and a form with 'Clearspace URL' (http://localhost:8080/clearspace) and 'Shared Secret' (\*\*\*\*\*). A 'Save Shared Secret' button is at the bottom. To the right, a 'Connection Status' box shows 'Not Connected' and 'Real-Time integration is not connected.'

Admin Console: System > Real-Time > Connection

## Viewing the Openfire Admin Console

If you've got a running instance of Openfire and you've enabled its integration with Clearspace, you can launch its admin console from the Clearspace admin console.

Admin Console: System > Real-Time > Openfire Admin

## Getting Information About Performance

Clearspace provides tools through which you can keep track of the application's performance and usage. You can even easily connect your Clearspace instance to a web analytics application to get more detailed usage statistics.

You'll find a thorough guide to getting the best performance out of your Clearspace instance in *Fine-Tuning Clearspace Performance*.

## Adjusting Application Caches

Clearspace caches data in order to reduce the number of trips the application makes to its database. The caches greatly improve performance by letting people get things done in the application more quickly. You can adjust the sizes of these caches so that they're best tailored for your instance's needs.

You'll probably do most of your cache adjustment during the first few months of your deployment, then less frequently as use of Clearspace grows. For more information on improving performance, including adjusting caches, be sure to see *Fine-Tuning Clearspace Performance*.

Admin Console: System > Settings > Caches

## Examining Database Queries

You can view the query expressions Clearspace uses as it interacts with its database. This is handy when you're troubleshooting or looking for ways to improve Clearspace performance. For example, you might use it to look for long-running queries or queries that are running too often.

When you turn this feature on, the admin console displays the query expressions executed (without the actual values used), the number of times a query is executed, the time in milliseconds it took to execute a query, and the average time the query took.

Keep in mind that turning this feature on and leaving it on will slow Clearspace's performance. It's best to use it only while you're collecting performance information.

### Query Stats

**Query Statistics Status**

Enabled
  Disabled

**Query Statistics Settings**

Refresh: 
 |
  |

**SELECT Query Statistics**

|                                   |      |
|-----------------------------------|------|
| Total # of selects                | 102  |
| Total time for all selects (ms)   | 146  |
| Average time for all selects (ms) | 1.43 |
| Selects per second                | 1.03 |
| 20 Most common selects            |      |

| Query   | Count | Total Time (ms) | Average Time (ms) |
|---|-------|-----------------|-------------------|
| SELECT jiveBlog.blogID AS theBlogID, jiveBlog.creationDate AS theCreationDate FROM jiveBlog , jiveBlogToUser WHERE jiveBlog.blogID > ? AND jiveBlog.blogID = jiveBlogToUser.blogID AND jiveBlogToUser.userID = ? ORDER BY theCreationDate DESC LIMIT 0, 400 | 1     | 1               | 1                 |
| SELECT name, propValue FROM jiveCommentProp WHERE commentID=?   | 1     | 0               | 0                 |
| SELECT fieldID, idx FROM jiveProfileField ORDER BY idx  | 1     | 13              | 13                |
| SELECT count(*) FROM jiveAttachmentDL WHERE attachmentID=? AND downloadComplete=?   | 1     | 0               | 0                 |
| SELECT attachmentID, objectID, objectType, fileName, fileSize, contentType, creationDate, modificationDate FROM jiveAttachment WHERE attachmentID=?   | 1     | 0               | 0                 |
| SELECT blogID, name, displayName, description, creationDate, modificationDate   |       |                 |                   |

Admin Console: System > Management > Query Stats

## Setting Compression for HTML and CSS

If your application server supports it, you can set Clearspace to compress HTML and CSS files to reduce bandwidth. If you want to enable compression, be sure to test it in a development environment (to be sure pages display correctly) before using it on your production server.

For more on improving performance, see *Fine-Tuning Clearspace Performance*.

Admin Console: System > Settings > Page Compression

## Getting Application Logs

Clearspace logs messages with application information, warning, and errors. When you want to collect information to troubleshoot or enhance application performance, you can view the log messages in the admin console. (You can also log information about database queries, as described in [Examining Database Queries](#) (page 10) .)

The Log Viewer page displays the log content and gives the file system location where you'll find the log files themselves. You can specify the name for each log file by editing the file <jiveHome>/jive\_startup.xml. Here's an example with the default log file names (if you change values in this file, you'll need to restart Clearspace for the changes to take effect):

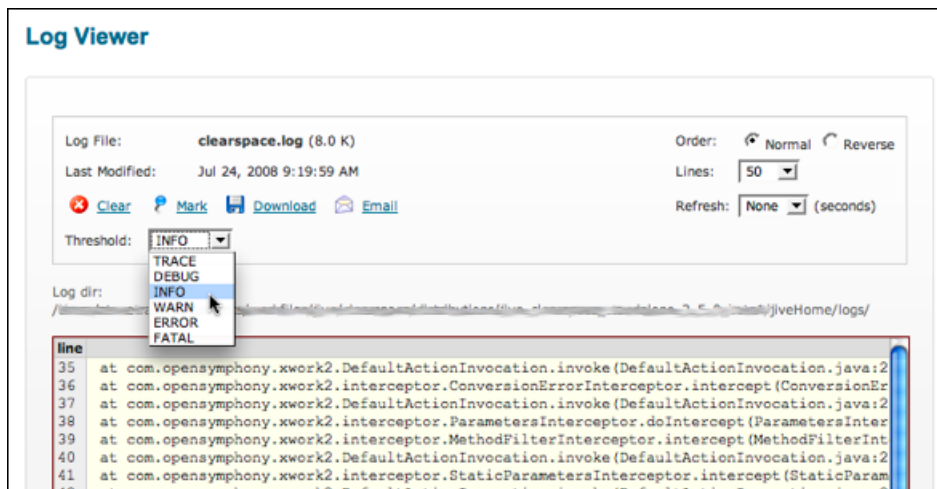
```
<jive>
  <!-- ...other properties... -->
  <log>
    <filename>
```

```

<trace>jive.trace.log</trace>
<debug>jive.debug.log</debug>
<info>jive.info.log</info>
<warn>jive.warn.log</warn>
<error>jive.error.log</error>
<fatal>jive.fatal.log</fatal>
</filename>
</log>
<!-- ...other properties... -->
</jive>

```

Note that logs in the console aren't the same as as messages logged by your application server. See your app server's documentation to locate its logs.



Admin Console: System > Management > Log Viewer

## Auditing Administrative Tasks

Clearspace logs actions you and others take through the admin console. You might find these logs useful when you're tracking down the cause of an error or misconfiguration in the system.

Each log entry includes the time the action was taken, the person whose action resulted in the entry, and the part of Clearspace code that executed to carry out the action.

clearspace<sup>®</sup> Clearspace 2.0.0 beta  
Logged in as admin - [Logout](#)  
[View Site](#)

Dashboard **System** Spaces Blogs People Reporting Real-Time

Management **Settings** Plugins Import / Export

- System Information
- License Information
- System Properties
- Locale
- Log Viewer
- ▶ **Audit Log Viewer**
- Query Stats
- Phone Home
- Service Cloud

### Audit Log

The log messages here correspond to user actions (generally administrative). Each entry names the user and describes the code that executed on the user's behalf. Use the log to review actions that could affect how the application performs.

**Filter options:** Start Date:  End Date:  Filter By User:

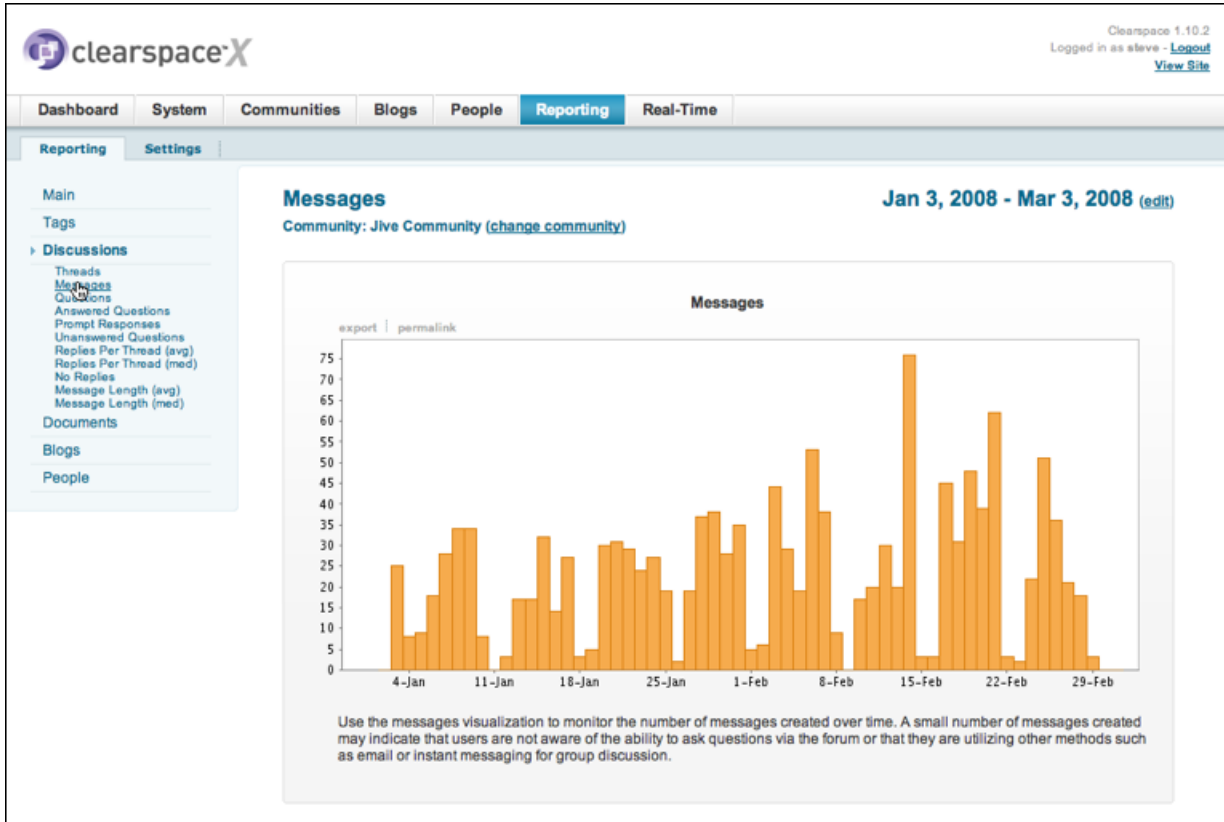
Items per page:  Pages: 16 [ [Previous](#) | [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) ... [16](#) | [Next](#) ]

| Timestamp  | Description   | User          |
|--|---|---------------|
| 2/29/08 1:39 PM  | Setting jive property 'questions.helpfulAnswersPerThread' <a href="#">(Click for details)</a>       | Administrator |
| <b>Details:</b> Changing value of jive property 'questions.helpfulAnswersPerThread' from 'null' to '2' |   |               |
| <b>Node:</b> 10.211.168.144  |   |               |
| 2/29/08 1:39 PM  | Setting jive property 'questions.helpfulAnswersPerThread' <a href="#">(Click for details)</a>       | Administrator |
| 2/29/08 1:39 PM  | setHelpfulAnswersPerThread called on DbQuestionManager <a href="#">(Click for details)</a>          | Administrator |
| 2/29/08 1:39 PM  | Setting jive property 'questions.markThreadAsQuestionByDefault' <a href="#">(Click for details)</a> | Administrator |

Admin Console: System > Management > Audit Log Viewer

## Tracking Usage Graphically

Clearspace provides charts that illustrates how people are using the application. You can check these reports periodically to get a high-level sense of how content is being used, such as whether discussion posts are replied to, questions answered, and so on.



Admin Console: Reporting > Reporting

## Integrating Web Analytics

You can connect Clearspace with a web analytics application such as Google Analytics or WebTrends. When you have an account with a web analytics provider, then add their script via the admin console, the script is automatically inserted by Clearspace at the bottom of Clearspace pages. The script isn't typically displayed to people, nor are the analytics results displayed in the admin console (you get them from your analytics provider).

Here's are two examples of what you might enter in the admin console:

```
<script src="www.google-analytics.com-urchin.js
<http://www.google-analytics.com/urchin.js">
  type="text/javascript"> </script>
```

or

```
<script type="text/javascript"> _uacct =
  "AB-123456-1"; urchinTracker(); </script>
```

Admin Console: Reporting > Settings > Third-Party Integration

## Sending Usage Statistics

You can choose to have Clearspace send usage statistics back to Jive Software. The Clearspace Usage Statistics Service periodically collects information about the installation environment and overall activity of your Clearspace instance. This information is offered anonymously; your identity is not included. Jive Software uses the information to make Clearspace even better by analyzing the installation platforms and product features used most often by our customers. The following lists describe what (and how often) information is collected. (Jive Software is committed to maintaining your trust and confidence. Thanks for your help!)

At start-up and once per week the following data is collected:

- Hardware vendor
- Clearspace version
- Operating system vendor and version
- Java Virtual Machine vendor and version
- Application server vendor and version
- Country database version
- User manager class
- Group manager class
- Authentication manager class
- Database vendor and version
- JDBC driver vendor and version
- Time zone
- Anonymous instance ID

Additionally, once a day the daily total counts are collected for the following:

- Messages
- Discussions
- Registered and active users
- Blog posts
- Questions
- Documents

Admin Console: System > Management > System Usage

## Managing Access

You can manage people's access to Clearspace features through the admin console. A few of these features (described below) are available to system administrators only. But the important work of granting permission for specific user and administrator tasks is available to both system and space administrators. For information about granting permissions, see *Managing Permissions*.

## Configuring User Registration and Login

**Note:** People using Clearspace must set their browsers to enabled cookies. Clearspace doesn't encode session IDs in URLs.

You can configure how people first get involved. This is especially important if the application is available to people who sign up on their own. You can set whether (and how) they can sign up on their own and whether their request for membership should be moderated. You can set up the user registration so that the registration page displays only a few of your user profile fields (to make registration easier).

If you enable moderation for membership requests, new requests will appear on administrators' Pending Approvals profile tab. To get to the tab, in the end user UI click Your Stuff > Items Awaiting Approval. (If you have a user administrator, that person will approve or decline requests; otherwise, the system administrator will get those requests.)

You can also set whether you send them a welcome message (and what the message contains), whether they can request a reset of their password, and so on.

Admin Console: People > Settings > Password Reset

Admin Console: People > Settings > Registration Settings

## Banning People

You can block a person's access to Clearspace. For example, if someone becomes abusive in their messages (or moderating their content is too time-consuming), you might want to ensure that they can't post any more. You can ban them through their login credentials or their IP address. (If you want to ban them using their IP address, you'll need to enable IP address tracking; the admin console has more information.)

Admin Console: People > Settings > Ban Settings

## Configuring Content Handling

Clearspace integrates documents, blogs, and discussions as distinct content formats that people can edit in a common way.

### Configuring Document Options

People can create new text documents (with word processor-style formatting) or they can attach documents of other types, including PDF files, Word documents, and spreadsheets.

There are two sets of configuration settings for documents: system-wide settings and space settings.

- *System-wide settings* (described in this guide) are available for system administrators. They include size of uploaded documents and content types that are allowed for uploading.
- *Space settings* are available for system administrators and space administrators. Provide a place for an administrator to designate people to approve documents published in the space.

The system-wide settings are described in this document; space settings are described in *Managing Spaces*, which is intended for space administrators.



Use the system-wide settings to configure documents globally based on how you expect people to use documents.

- You might want to disable uploaded documents if you want to ensure that users can create only text documents using the editor in Clearspace. (Note that the content of uploaded documents is searched just as are documents people write in Clearspace.)
- If you enable uploaded documents, you can disallow content types that you don't want stored in the system. People won't be able to upload content of types that you disallow.

Admin Console: System > Settings > Documents

## Configuring Discussion Options

Through discussions people ask for feedback from others. Unlike blogs and documents, discussions tend to have short-term interest (such as when a question is asked and answered) and the initial post tends to be more an invitation than a declaration (as many blog posts tend to be).

There are two sets of configuration settings for discussions: system-wide settings and space settings.

- *System-wide settings* (described in this guide) are available for system administrators. They include moderation email, read tracking, and threading.
- *Space settings* are available for system administrators and space administrators. These are settings that those using a particular space might want to have tailor for the space's needs. The settings relate to messages as questions, answers as helpful, level, and email alerts.

The system-wide settings are described in this document; space settings are described in *Managing Spaces*, which is intended for space administrators.

Use the system-wide discussion settings to configure discussions globally based on how you expect people to use Clearspace discussions. If you're seeing slower performance, try disabling read tracking and turning the thread mode default to "flat." Both of these features can tax performance on some configurations. (Note that users will still be able to set thread mode to either flat or threaded in their preferences.)

Admin Console: System > Settings > Discussions

## Managing Blogs

You can administer some aspects of top-level blogs, such as system and personal blogs. You can also migrate blogs between contexts.

(See *Managing Permissions* for information about managing blog permissions.)

## Contexts for Blogs

A blog can live in any of several different contexts. How the blog's administered depends on the context that contains it.

For the most part, these contexts contain other kinds of content, as well, including discussions and documents. For example, a blog can be contained by a space, a project, or a social group. You can't administer these through the admin console. Instead, they're administered by the blog's owners in the blog's Manage Blog page in the Clearspace end user interface.

Two kinds of blogs — system and personal blogs — can be said to live in a top-level context. These are blogs you can administer with the admin console (although, like other blogs, they're also managed by their owners).

The following table lists blog contexts, along with where each is administered.

| Blog Type            | Description   | Scope  | Where Administered                    |
|----------------------|---|--|---------------------------------------|
| System blog          | A system blog is not connected with any particular space or person.   | Top-level, not contained in any space. Must be created in the admin console.                           | Admin console, blog's management page |
| Personal blog        | A personal blog is associated with a particular user, who is its owner. A user can have only one personal blog. | Top-level, not contained in any space. Can be created by a user or in the admin console.               | Admin console, blog's management page |
| Space/community blog | Associated with a particular space. A space can have only one blog.   | Contained by the space. Can be created by a user.  | Blog's management page                |
| Project blog         | Associated with a particular project. A project can have only one blog.   | Contained by the project (which is contained by a space). Must be created when the project is created. | Blog's management page                |
| Social group blog    | Associated with a social group. A group can have only one blog.   | Contained by the group. Created by a group owner.  | Blog's management page                |

### Administering Top-Level Blogs

Remember that top-level blogs (personal and system blogs) are the only kind you can administer from the admin console. The following table summarizes administrative tasks related to top-level blogs. All of these are available to a blog's author on their Blog Management page. Some are also available to system administrators in the admin console.

| Blog Admin Task  | Who Can Perform              |
|--|------------------------------|
| Write, view, edit, and delete posts.   | Author                       |
| Write, view, edit, and delete comments.  | Author, System Administrator |
| Approve or delete trackbacks.  | Author, System Administrator |
| Edit options such as the blog's friendly name, its URL within Clearspace, its description. | Author, System Administrator |
| Add or remove blog authors.  | Author, System Administrator |

|  |        |
|--|--------|
| Specify whether people must authenticate in order to comment.  | Author |
| Approve comments before they're visible.   | Author |
| Turn feeds from the blog on or off, as well as set what is included in the feed.   | Author |
| Import content from another blog into a Clearspace blog. A blog author can import from Movable Type, WordPress, and other technologies listed on the Blog Management page. | Author |

### Configuring Top-Level Blog Options

You can enable or disable characteristics of top-level blogs in the admin console. For example, you can:

- Turn blogs on or off.
- Enable or disable comments and trackbacks.
- Enable and configure [ping](#) services. You can enable or disable ping, specify the URIs that should be pinged, and let blog authors specify their own ping URIs.
- Enable or disable [Akismet](#), a spam filtering service.

### Migrating Blog Content

You can migrate an existing blog from one context to another. For example, you can migrate a space blog so that it becomes a group blog. There aren't any restrictions -- you can migrate from any context to any other context. When you migrate, all of the blog's posts and settings will move to the destination context.

On the admin console's Blog Migration page, you choose the blog you want to migrate and the destination context. Under destination, you'll only see contexts that are able to accept the blog. For example, a space that already has a blog won't be listed (so no space will be listed if all spaces have blogs). To migrate, select the blog and destination, then click Submit.

Admin Console: Blogs > Management

Admin Console: Blogs > Settings

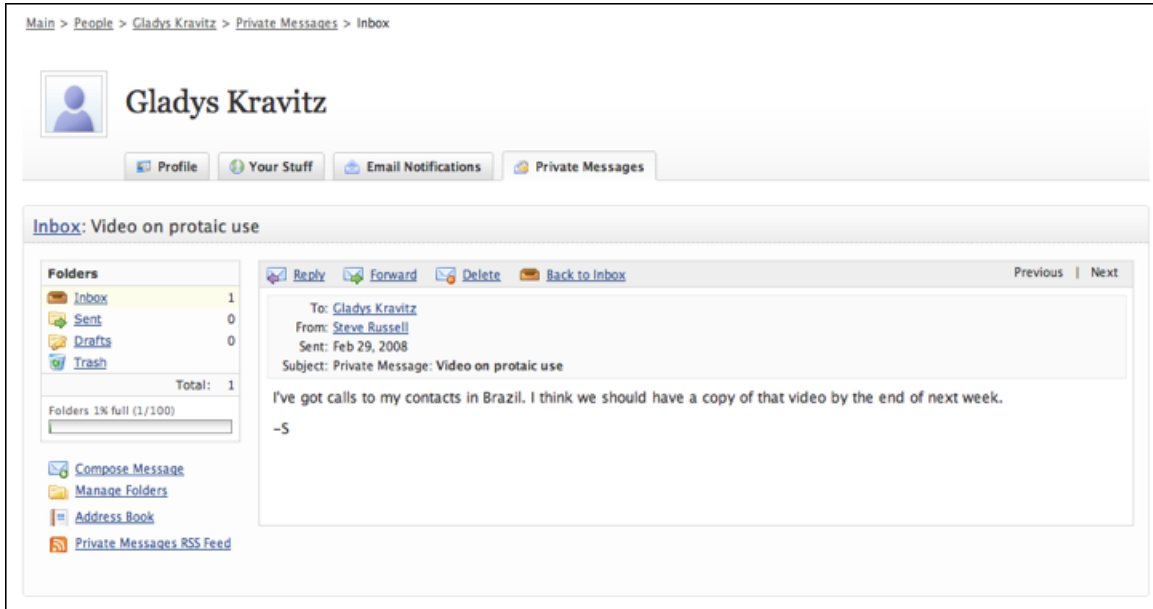
### Enabling or Disabling Projects

You can disable projects if people using Clearspace won't need them.

Admin Console: System > Settings > Projects

### Configuring Private Message Options

You can enable private messages, a feature through which people can send each other messages that aren't visible to everyone else in the way that discussions are. A person receives and reads a private message through the Private Messages tab on their profile.



In the admin console, you can turn the feature and its notifications on or off as well as set a limit on the number of messages allowed per person.

Admin Console: System > Settings > Private Messages

## Configuring Support for Images and Attachments

People can insert images and attach files to their documents, blog posts, and discussion messages. Using the admin console, you can configure Clearspace support for images and other attachments.

The distinction between images and attachments is important. People can *attach* to content any file you allow by using the Browse button at the bottom of the content editing page. Attached files will show up as links at bottom of published content, so that others can click to view the attachment. Note that when someone attaches an image, a preview of the image shows with its link. People can also *insert* images by using the insert image button on the editing page toolbar. Inserted images will be displayed in the content itself, but won't show up as links at the bottom of the page.

In the admin console, the **Attachments** page is for configuring the attachment feature; the **Images** page is for configuring the "insert image" feature. It's a good idea to tailor these settings to best fit your situation. Here are a few suggestions.

- Adjust the cache. Clearspace provides two cache types: file system and in-memory. Use the **Images** and **Attachments** pages in the admin console to adjust the file system cache. For example, you might want to increase the cache size if images or other attachments are filling the file system area you're caching to (typically <jiveHome>/images or <jiveHome>/attachments). Note that changing the filesystem cache size on the the **Images** page makes the same change to the same setting on the **Attachments** page, and vice versa. You can make in-memory cache changes (for images) on the System > Settings > Caches page. This is a much more short-lived cache that has a larger impact on performance. See *Fine-Tuning Clearspace Performance* for more on adjusting in-memory caches.
- Manage image and attachment quantity and size. Pay attention to whether larger or more numerous images and attachments make Clearspace slower. If you find that many people are attaching many larger files (and that this is making the application slower), then you might want to create limits by adjusting the size and quantity settings.

- Disallow support for certain content types. You might find that some content file types aren't needed (or are in fact unwanted). You can prevent some kinds of files from being uploaded to Clearspace by "disallowing" them, specifying their MIME content type. If you change these settings, be sure to change it on both the Image and Attachments pages.
- Adjust how images are rendered. You can set guidelines for how Clearspace displays images in content. For example, Clearspace will display attached images as a thumbnail (a smaller version of the image) if the image itself is larger than the size you specify on the **Images** page.

Note that some of the settings are interrelated. For example, if you want people to be able to attach more images to a document than they are currently allowed to, you'll need to make two changes: increase **Maximum number of images per object** of the **Images** page and increase **Max number of attachments per document** on the **Attachments** page.

Admin Console: System > Settings > Attachments

Admin Console: System > Settings > Images

## Configuring Spell Check

Clearspace checks spelling as people create and edit content. You can tailor this feature to your needs by specifying dictionaries that are specific to your locale or technical needs. You can also add words not in the main dictionary to the custom dictionary that you Clearspace instance uses; that way, words commonly used where you are won't be marked as misspelled.

Admin Console: System > Settings > Spell Check

## Configuring Search

Clearspace provides search access to content it contains (including information about people) as well as access to external search engines that support OpenSearch. You can use the admin console to configure and optimize these for use across your Clearspace instance.

### Main Search

Support for searching internal content and user profiles is provided by the [Lucene](#) open source search engine. Lucene works by periodically creating an index of content, then searching against the index. As a result, search results are affected by, say, how often the index is updated.

Note: Clearspace includes *Search Tips* documentation that people can use to make the most of their searches. You can reach the tips from a search page.

Things to keep in mind as you manage the main search:

- The indexes for content and for user information are separate from each other. That means that you can enable searching for content and user information separately (you can turn user searching off, for example). It also means that you can update the indexes separately at need, which can be more practical than updating everything at once when you need to.
- Having Clearspace regularly update the search indexes is very handy; rebuilding an index (via the Index Tasks tab) can be very time-consuming. You should only manually rebuild if you really have to; reasons for doing so are listed in the admin console.
- When you choose to log search queries, the log information is written to the database supporting your Clearspace instance. You can retrieve this information by querying the `jiveSearch` and `jiveSearchCriteria`

tables. For example, a query can return the query terms used, how many results were returned, the ID for the user who did the search, and so on.

- You can improve searches for people using your Clearspace instance by tailoring the stop words and synonym lists to best suit your needs. For example, if you realize that people will search using slang common to your industry, you could add synonyms that associate a commonly used term with slang alternatives. A software industry example could be "programmer,developer,engineer".
- Try to settle on your list of stop words early, before you've got a lot of content. When you change the list, you need to rebuild the search index; that can take quite a while when you've got a lot of content in the database.
- You can set whether blog and document comments should be found when searching by setting system properties. Use the following system properties (in the admin console at System > Management > System Properties):

| Property                        | Description   | Values  |
|---------------------------------|---|---|
| blog.searchComments.enabled     | Toggles whether or not comments to blog posts are returned in search results. | true (default) to enable return of comments on search; false to disable it. |
| document.searchComments.enabled | Toggles whether or not comments to documents are returned in search results.  | true (default) to enable return of comments on search; false to disable it. |

Admin Console: System > Settings > Search

## OpenSearch

You can make some external search engines available to people using Clearspace. If a search engine supports OpenSearch, you can add support for it to Clearspace so that the search engine will be used (in addition to the internal search engine) when people search for content. Examples of OpenSearch engines include [Technorati](#) and [Wikipedia](#), not to mention Clearspace instances (such as [Jivespace](#)).

Engines that support OpenSearch provide a descriptor XML file and usually publish the file at a public URL. The descriptor tells OpenSearch clients (such as Clearspace) what they need to know to query the search engine.

There are two ways you can add OpenSearch engines in the admin console at **System > Settings > OpenSearch Engines**:

- Enter a descriptor URL, then click **Add Engine from Descriptor URL**. Clearspace will visit the URL to retrieve the descriptor XML file, then retrieve the needed information from the file.

If Clearspace gets the information it needs, that's all there is to it. However, you might get prompted for more information, such as login credentials if the engine is secure. Note that you can edit engine properties later.

### OpenSearch Engines

Descriptor URL

or

Allow anonymous users to view results

| Engine Name | Results Inline | Requires Authentication | Enabled |
|-------------|----------------|-------------------------|---------|
|-------------|----------------|-------------------------|---------|

- Click **Add Engine from Form**, then fill out the form to include the required information. The information asked for here is what would be included in the descriptor XML file. This is the same information you can edit for an engine, as described below.

### OpenSearch Engines

**Name\***

Description

Descriptor URL

Icon URL (16x16)

**Search URL\***

**Search Result Content Type\***

**Query Test Term\***

Maximum Number of Results

Username

Password

Enabled

| Engine Name                           | Results Inline | Requires Authentication | Enabled   |
|---------------------------------------|----------------|-------------------------|---|
| W <a href="#">Wikipedia (English)</a> | No             | No                      | Yes <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

As you edit the engine's properties, keep in mind the following:

- The icon URL is a URL to an icon representing the search engine. Clearspace will display this in its UI.
- Clearspace uses the search URL to send the user's query.
- The search result content type is the content type, such as application/rss+xml or text/html, that the search engine's results will be returned in. If this is a type that Clearspace can parse, such as application/rss+xml, the results will be displayed in the UI; if not, Clearspace will display a link through which the user can separately search the engine's site itself.
- The query test term can be anything you like to test queries.
- You might need to enter a username and password if the search engine requires login credentials.
- The Enabled check box is selected by default, meaning that user searches will query the engine. Clear the box to make the search engine unavailable to people.

Admin Console: System > Settings > OpenSearch Engines

## Managing Feeds

People can choose to receive feeds (RSS 1 or 2, Atom) to stay up to date on changes to content they care about. You can configure aspects of these feeds such as which feed technology is used, whether basic authentication is required, and so on.

For more on feeds in Clearspace, be sure to see *Working with Clearspace Feeds*.

Admin Console: System > Settings > Feeds

## Filtering and Formatting Content

Filters and macros both dynamically reformat the contents of messages, announcements and polls. Filters can be applied globally. They are similar concepts but filters can apply to the entire block of text and macros operate on a specific part (for example, {macro}will alter text in here{macro}).

This console page lists the filters and macros installed for your instance. At the bottom of the page you can install others.

**Use filters and interceptors.** A filter dynamically formats message content before it posts to the space. In contrast, an interceptor uses specific criteria to accept, modify, or reject an entire incoming message before it enters the space. Filters and interceptors can be applied to discussions, document comments, and blog comments. Because you can't apply interceptors to documents (and to a blog post only when it's first created), make sure you're comfortable with the employees you allow to author those types of content when setting permissions. When you don't want any part of a post or comment with an offending word to enter the space before an action is taken, use an interceptor instead of a filter.

**Apply a profanity filter.** This filter automatically detects words in your profanity list and replaces them with \*\*\*. The profanity filter is the most commonly used filter; please consider using it. You use the filter by adding the words you want filtered out, then turning on the filter. On the Filters and Macros page, scroll to the profanity filter and click its Settings link. On the filter settings page, enter the list of words you want filtered out of your content. Be sure to select check boxes for the parts of the content you want filtered, then click Save Properties. Back on the Filters and Macros page, click the profanity filter's On button to turn it on.

Admin Console: Spaces > Settings > Interceptors

Admin Console: Spaces > Settings > Filters and Macros

## Configuring User Relationships

You can configuring the relationships feature so that it best fits the way people using Clearspace will interact with each other. You can configure two kinds of relationships:

- **Friend relationships** are created by users and come in two flavors. If you turn on approval for friend relationships, they're displayed as "friends." One person can request add someone as a friend and the other person must approve the request. If approval is not enabled, then these relationships are displayed as "following." One person requests to follow the other (to watch their content, for example), but the other needn't approve that request. Even so, the other person can see who's following them as well as who they're following.



You can also configure friend relationships so that they're bidirectional. For example, when one person adds someone as a friend (or begins to "follow" them), the other person automatically adds the first as a friend.

- **Organizational relationships** are the kind people have at work, such as manager and direct report. You can set whether the manager or direct report can create the relationship themselves (such as when a manager adds others as direct reports). If your user data is managed by an external system such as LDAP, select **Is neither allowed** to prevent people from creating relationships. In the Notified Users box, enter the user names of people who should be notified when relationships are created (such as someone in the human resources department).


For either kind of relationship, you can disable it by clearing the **Is graph enabled** check box.

Admin Console: People > Settings > Organizational Relationship Settings

## Configuring Status Levels

Creative status level goals are a great way to encourage people to get involved. People accrue status by earning points as they create and respond to content in Clearspace. Over time, people develop a reputation for reliability and authority in their favorite areas. The more people participate, the more information that is available for the community as a whole.

You can set how many points are awarded for a given scenario (an action in Clearspace). You can also define the status levels themselves, setting the point range that the status level represents.

Where a person's name is displayed, Clearspace displays a status icon such as  corresponding to the number of points the person has accrued. By default, for example, Clearspace includes the following status levels: master (501-1000 points); junior (101-500 points); newbie (0-100 points). You can configure the levels, along with how many points correspond to an action and what image should be used for the status icon.

Clearspace provides more than 50 status images, but if you want to add your own you can. To do that, put the GIF files into a `<jiveHome>/resources/images/status` directory. Use the same naming scheme as the existing images: `statusicon-<number-in-sequence>.gif`. You might want to start your numbering at some higher level to avoid problems if Clearspace upgrades include more images. For example, to add five new images (where included images currently end at number 52), you could add images called `statusicon-100.gif`, `statusicon-101.gif`, `statusicon-102.gif`, `statusicon-103.gif`, and `statusicon-104.gif`.

Here are a few suggestions for making the most of status levels:

- Set the number of points per scenario based on the kinds of activity you want to reward in Clearspace. For example, if you want to provide a context in which questions are usually answered, award more points for correct and helpful question responses.
- Define status levels that people will be enthusiastic about -- make it fun. For example, you could think of it as a kind of game. Is the highest level a "Ninja"? A "Genius"? "Indiana Jones" or "Nobel Candidate"? Devise a list of levels that goes well with the culture of people using Clearspace.
- Offer rewards or recognition for people who reach or maintain certain status levels.

Admin Console: People > Settings > Status Level Settings

## Avatar Settings

Enable user-uploaded avatars as one of the ways to let people personalize their experience on Clearspace. You can simply enable avatars, in which case administrators will be able to define (even upload) the avatars people

can choose from. But you might find that people get more out of Clearspace by uploading their own avatar images.

With avatars enabled, users will get a "change avatar" link in the Actions list of their profile page. Depending on how you've set up the feature, users will be able to select from an existing set of avatar images or upload their own.

Admin Console: People > Settings > Avatar Setting

## Setting Access for Web Service Clients

Clearspace exposes much of its functionality as web services. Through a web service client, other applications can interact with Clearspace. In order for this to happen, you'll need to first enable one or more of the web service styles that Clearspace supports. These include SOAP and REST. The style you choose will depend on your design goals and the client's needs.

You have several options as to what you'll allow and require for clients attempting to access your instance via web services. You can allow any client to have access or restrict access to clients that authenticate with credentials found in your user database.

Admin Console: System > Settings > Web Services

## Synchronizing Content with Email or Newsgroups

You can create gateways through which Clearspace will synchronize data between a space and an email, newsgroup, or [Mbox](#) data source.

When you create a gateway, you specify the data source to synchronize with, along with the space to synchronize. In other words, each gateway is a one-to-one mapping between a space and the data source. You can either create a gateway that's automatically used for synchronizing or you can synchronize data in either direction at need. Gateway settings are scoped to specific spaces.

You can also choose to use a 24-hour buffer for importing. That means that, at the time of import, the gateway pulls in all data that has come in since the last import, plus all those that came in within the 24-hour period before the last import. For example, if an email has already been imported, it won't be imported again, but any emails that came in late and were missed the last time the gateway ran will be imported. This redundancy helps ensure that you get those emails that were held up at the server for some reason and did not get delivered in a timely manner.

To use a gateway for automatic importing or exporting, you add the gateway, then specify the time interval for importing and/or exporting. To use a gateway for one-time or at-need synchronization, you use the Import Once or Export Once tab.

Admin Console: Spaces > Settings > Gateway Settings

## Managing Customizations

Plugins, themes, and other extensions are ways to add and enhance Clearspace features.

## Adding and Editing Themes

With themes, you can customize the way Clearspace looks, adding your own logo and brand information. You can even change the composition of Clearspace pages, rearranging them, adding and removing features.

Depending on how much you want to change the UI, there are three approaches you can take. For information, see the *Customizing UI the Basic Way*, *Customizing UI with the Theme Resource Kit*, or *Advanced Theming Topics*.

Admin Console: System > Settings > Themes

## Substituting Phrases in the UI

You can substitute your own words for phrases you find in the user interface. For example, you might want to rename "Documents" to "Articles." Your substitutions are part of a theme.

For more information on making substitutions and developing themes, see the *Advanced Theming Topics*.

Admin Console: System > Settings > Phrase Substitutions

## Adding and Removing Plugins

If your Clearspace instance has any plugins installed, you can view a list of them on the Installed Plugins page. If you don't have any yet, Jive Software offers a few you can get started with. The Add Plugin page lists plugins that are available free from Jive Software. It also provides a place to add plugins for which you have a JAR file.

Whenever you add or remove a plugin, you'll need to restart the application server.

**Note:** In previous versions you could deploy a plugin by copying its JAR file to your <jiveHome>/plugins directory. That's not supported in this version.

Admin Console: System > Plugins > Installed Plugins

Admin Console: System > Plugins > Add Plugin

## Adding and Removing Widgets

Clearspace comes with a set of widgets people can use to customize pages. If you don't want certain widgets to show up where people can customize page layouts, you can remove them using the admin console. You can also add new widgets. At the bottom of the page, under Add a new widget, enter the fully-qualified class name of the class for the widget you're adding, then click Add Widget. The JAR containing the widget you're adding must be on the Clearspace classpath.

Admin Console: System > Settings > Widgets

## Fine-Tuning with System Properties

System properties are name/value pairs that configure particular aspects of Clearspace. Many of these are tied to other settings in the admin console, so that changing the value in the console will change the value of the corresponding system property.

**Warning:** Changes to some system properties have dramatic effects on the system — a wrong value can break the application. Generally speaking, you should leave system properties unchanged unless you're asked to change it by Jive's support team. You might also change a system property value if the change is part of a larger effort to customize Clearspace. Names and values for system properties and extended properties are case sensitive.

Admin Console: System > Management > System Properties