Collaboration

Administrators Guide

Adaptive Planning, Inc.
Collaboration: Administrator Guide

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1. Introduction

One of the key aspects of the budgeting process is the ability for the participants to collaborate with one another. Budget participants need to share information and documents and have a means to discuss the process, procedures, and responsibilities. The **Collaboration** feature in Adaptive Planning integrates communication and documentation that would otherwise take place outside the system, and provides a central repository for all budget related information.

Here are some examples of what a company may use the Collaboration features for:

- Posting reports or other information that is not available in Adaptive Planning, but is pertinent to the budgeting process.
- Posting specific instructions for the Budget/Department Managers
- Posting Deadlines, Announcements, and Polls
- Posting Instructions and Information for Administrators
- Link to information on other Websites or on your Company's Intranet
- Hold online discussions about the budgeting process.
- Create a knowledge base

This guide is intended to provide Administrators with the information needed to successfully use the Collaboration features and understand Administrative access. It is intended to supplement the **Getting Started with Collaboration** guide. See section 3 in the **Getting Started with Collaboration** guide for more information on navigating the Collaboration area, searching for, creating and collaborating on content, personalizing your home page, and setting up e-mail notifications and RSS feeds.

2. Collaboration Overview

The Collaboration feature refers to communities where users can share data and participate in discussions. Each company will have access to a private community with sub-communities and have access to the public "Financial Best Practices Community". The private community is accessible only by the Adaptive Planning users that exist in your company and the "Financial Best Practices Community" is a public area that is available to anyone inside and outside your company.

What is a Community?

A **community** is an area for content such as documents, and discussions. A community can also contain tags, polls, and announcements. Typically, communities are arranged in a hierarchy that reflects the organizational groups of Collaboration users. For example, in a company, the team responsible for the budget might have its own community, with a sub-space with content for Administrators. There may be other sub-communities that are specific to the Sales Team or to the Executive Team.

Note: *The term **space** will be used interchangeably with community in this document.*

The concept of a community is important to understand because communities provide the context for organizing content, sharing information, and collaboration. A community can reflect and support the distinctive characteristics of how the group using it interacts with each other. Communities can also contain sub-communities to further organize content.

Adaptive Planning users can seamlessly move from the Planning and Administrative areas to the Collaboration area by clicking on the links in the top right corner of the application.

Clicking on the **Collaboration** link takes users to the private community that is specific to their company, and clicking on the **Community** link takes the user to the "Financial Best Practices Community".

A user can directly log into the Financial Best Practices Community, by navigating to community.adaptiveplanning.com. Once in the Financial Best Practices Community, the user will be able to move seamlessly into the other areas of Adaptive Planning by clicking on the links pictured above.

3. User Administration Related to Collaboration

There are two different Administrative functionalities related to the Collaboration feature. One type of Administrative access allows an Administrator to assign access to the Collaboration area. The other type of Administrator access gives a user rights to manage certain properties of the private Collaboration area. The Administrators who manage the private Collaboration area for each company are known as **Space Administrators** or **Community Administrators**. See the section called **Space/Community Administrator** for more information about this role.

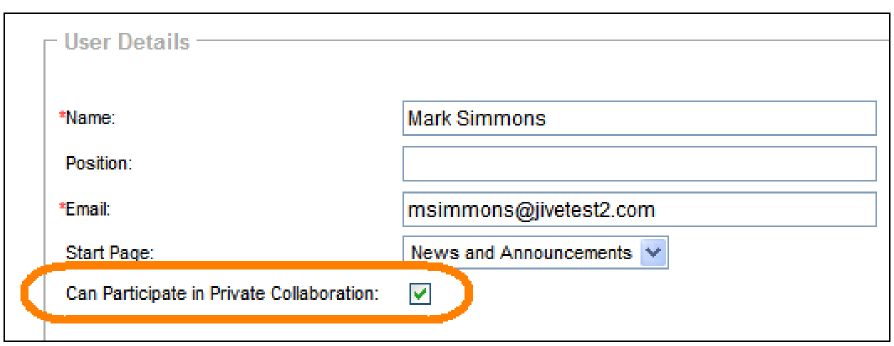
Assigning Access to the Collaboration Area

Administrative users with the **Company, Users, and Roles** permission can assign access to the Collaboration feature. *When the Collaboration feature is initially deployed, all Adaptive Planning Hosted Enterprise or Corporate Edition users will be given access to the feature*. If there are certain users who currently have access to Adaptive Planning, but you would like to restrict their access to see the Collaboration area, you will need to take further action to revoke their access. See Revoking a User's Permission to the Collaboration Area below. When you create new users after the initial deployment of Collaboration, you will need to specify if the new user can participate in Private Collaboration.

The following sections provide detailed information about giving users access to the Collaboration area and explain how making changes in the **Add User** or **Edit User** screen impacts a Collaboration user.

Assigning Access to the Collaboration Feature

On the **Add User** or **Edit User** page, there is a checkbox named "Can Participate in Private Collaboration" which is where access to the company's private Community is controlled. If the "Can Participate in Private Collaboration" is not selected for a user, the user will not see the Collaboration or the Community link at the top of the screen.



When the check box is selected in a user's account profile, the user is created in the company's private community. Each user will fall into one of the following two scenarios:

- If the user already has a profile in the "Financial Best Practices Community", the user's profile will be updated with an Adaptive Planning flag and associated with the company's private community space.
- If the user's e-mail address does not exist in the "Financial Best Practices Community", then a new profile is created in the company's private community space.
- Users will be able to log into their profile from the Adaptive Planning login screen or from the "Financial Best Practices Community" page.

Changing User Details

Any changes to a user's user name, e-mail, or password in the Edit User screen in Adaptive Planning will be reflected in the users profile in both the public and private community spaces.

Deleting a User

If a user is deleted from Adaptive Planning, the user is:

- Left as a user in the "Financial Best Practices Community"
- Removed from any Collaboration groups associated with the company from which the user was deleted. This includes all the main community and any sub-communities the user was assigned to.
- No longer marked in the "Financial Best Practices Community" as an Adaptive Planning user. The user will no longer see the Adaptive Planning links (Planning, Admin or Profile, Collaboration, Community, and Help) at the top of the screen.

Note: Requests to delete users should be sent to support@adaptiveplanning.com.

Revoking a User's Permission to the Collaboration Area

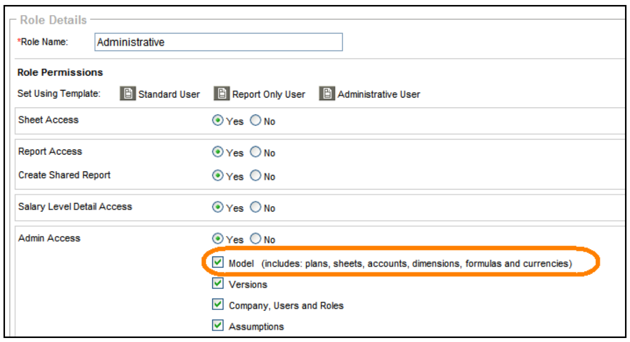
To revoke a user's permission to the Collaboration area, unselect the "Can Participate in Private Collaboration" checkbox in the **Edit User** screen and click **Submit** at the bottom of the screen. When the user profile is saved, the user:

- No longer has access to the private community and no longer sees the Collaboration and Community links in the top right corner of the screen
- Has access to log into the public "Financial Best Practices Community"

Space / Community Administrator

Space Administrators can create sub-communities, polls and announcements, manage tag groups and customize the space overview page for their private community and sub-communities. Space Administrators also have the ability to moderate content within the company's private Collaboration areas.

*When the Collaboration feature is initially deployed, all users who have **Model** permissions in Adaptive Planning will by default become Space Administrators. After the initial deployment, any new users who are given **Model** permissions will not automatically become a private community Space Administrator. Similarly, if a user's Model Permissions are revoked either by a change in the user's role or by assigning the user a new role, the private community Space Administrator rights will not be revoked.*



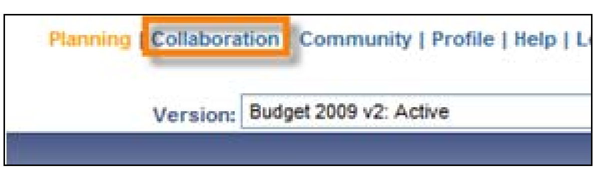
4. Getting Started – Space/Community Administrators

As a space Administrator, you will need to start by creating username to identify yourself within the community. The sections below will take you through the steps to create sub-communities, create and manage polls, announcements, and tag groups, and customize the space overview pages that all of the users with access to your private community will see.

Creating a Username

When using the Collaboration feature for the first time, all users whether Space Administrators or Standard Users will need to specify a username. The steps to create your Username are outlined below:

1. Click on the Collaboration link in the top right corner of your screen.



2. Clicking the Collaboration link will take you to a screen where you can specify a username. The Username that you create in this process is how you will be identified in your private community and in the public community if you choose to participate there. As an Adaptive Planning user participating in your private community, your user profile will initially be private, meaning that only people with access to your company's private community can see your profile. You have the option to edit your profile and make it public by setting the "Profile Visibility" setting to public.

   Note: Consider the Username carefully before saving because it cannot be changed at a later time.

3. Once you have input your Username, click Save.

Create Sub-Communities

One of the first things you will likely do when setting up the Collaboration feature is create sub-communities to reflect your company's functional areas or interests.

You will likely find that you are defining sub-communities in ways that reflect how people organize themselves both inside and outside of Adaptive Planning. Sub-communities are likely to reflect organizational subdivisions, but they could also mirror areas of interest or other more informal boundaries. For example, you might create a Sales sub-community to reflect the sales department, and then create sub-spaces such as Channel Sales, Business Development, and Direct Sales. Other criteria by which to define sub-communities include functional area and topic.

As you define sub-communities, keep in mind the following:

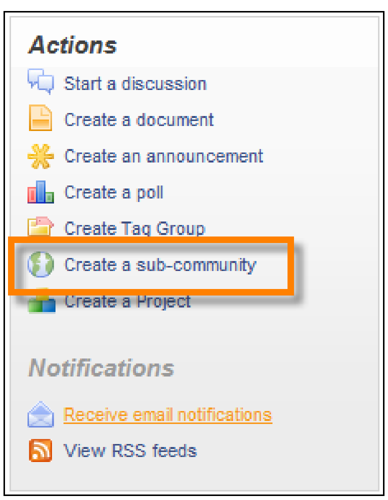
- When defining sub-communities, make sure the divisions and hierarchy are intuitive to people. You might start by looking at how people and teams are organized. You could also create a suggested space/sub-space hierarchy and get user feedback on it.

- Create a general, high-level hierarchy to start at first. Once people are involved, they will refine the categorization using tags. As a general rule, larger numbers of spaces and sub-spaces tend to create silos and reduce the power of tagging and tag groups.
- Define sub-communities with the role of tags in mind. Sub-communities organize content, but over time, tags will grow to constitute virtual groups to organize content also. As people apply tags to content, for example, a tag such as "personal" might come to mean "a discussion or document that isn't connected with the company's business." In other words, this is probably a better way to categorize "personal" posts than a "Personal" sub-space would be.
- Note that content cannot be shared and tagged between discrete sub-communities -- only within the space in which it is created. Use a sub-community to group multiple concepts or functional areas; use a tag group to group together discrete concepts within a space.
- For usability reasons, avoid creating a large number of sub-communities. With a large number of spaces, certain elements in the user interface can become difficult to use. These include lists (including dropdown lists) that display the names of all the spaces.
- Content from a sub-community is not found when searching the main private community that contains it, nor is the contained content listed on the All Content page. You can show content for each sub-space with a widget when you customize the space's Overview page. You can also use the Recent Activity widget to show recent activity for all sub-spaces.

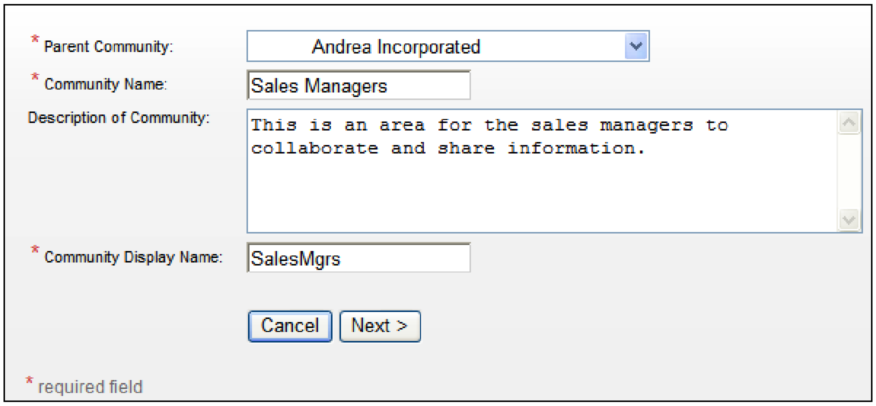
Creating a New Sub-Community

The steps to create a new sub-community are detailed below:

1. From the Actions list in the community, click on the **Create a sub-community** link.



2. In **Step 1**, for a **Community Name**, enter the name you want to appear for the space in the user interface.

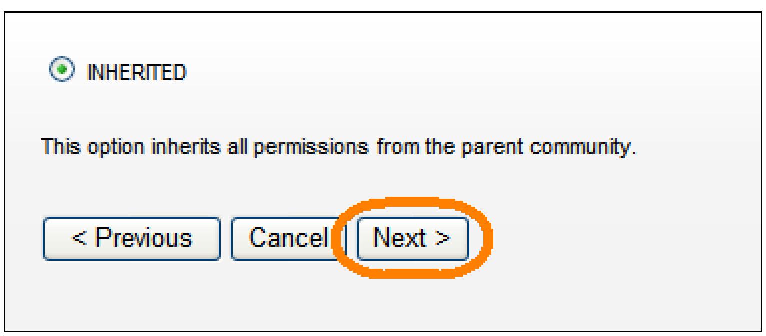


3. Enter a description that will appear in the user interface, such as a brief description of what the sub-community is for.

4. For **Display Name**, enter the text that will be used in URLs to access the sub-community. Follow these rules when specifying the Display Name since it is part of the URL:

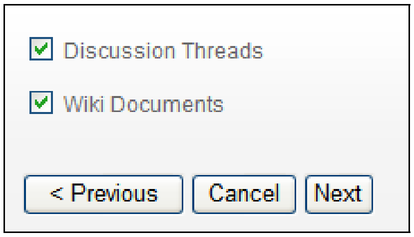
    - Only letters and numbers (A-Z, a-z, 0-9) be used
    - Shorter names are generally better than longer names
    - Never change the display name after you create a community as that can break bookmarks

5. In **Step 2**, click Next.



Currently, all sub-communities have an inherited property, which means that all users with access to Collaboration area in your company's model will be able to see the data in any sub-community. In the future, you will be able to create ***private*** *sub-communities where you can assign access to specific users.*

6. In **Step 3**, select the content types for this sub-community. People using the space will be able to see or create only those kinds of content specified here.



7. In the last step, review your choices (click Previous to make any changes), then click Finish. Assign Access to the Communities

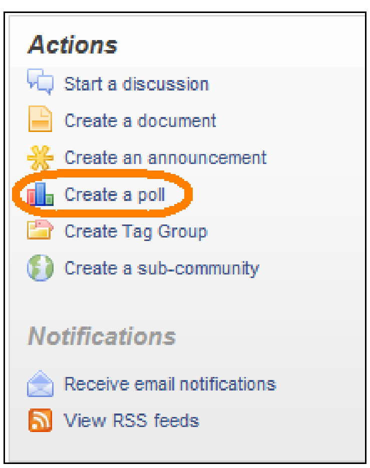
Create Polls

A poll is a way to ask a multiple choice question of other people in the community. When you create a poll, you define the question and the possible answers. The poll appears on the home page for the space it's created in. As people respond to the poll, results are shown graphically as colored bars. (The application ensures that a person has only one opportunity to vote in the poll.)

For example, you may want to see how your end users perceive Adaptive Planning. You could create a poll like the one shown below to collect this information.

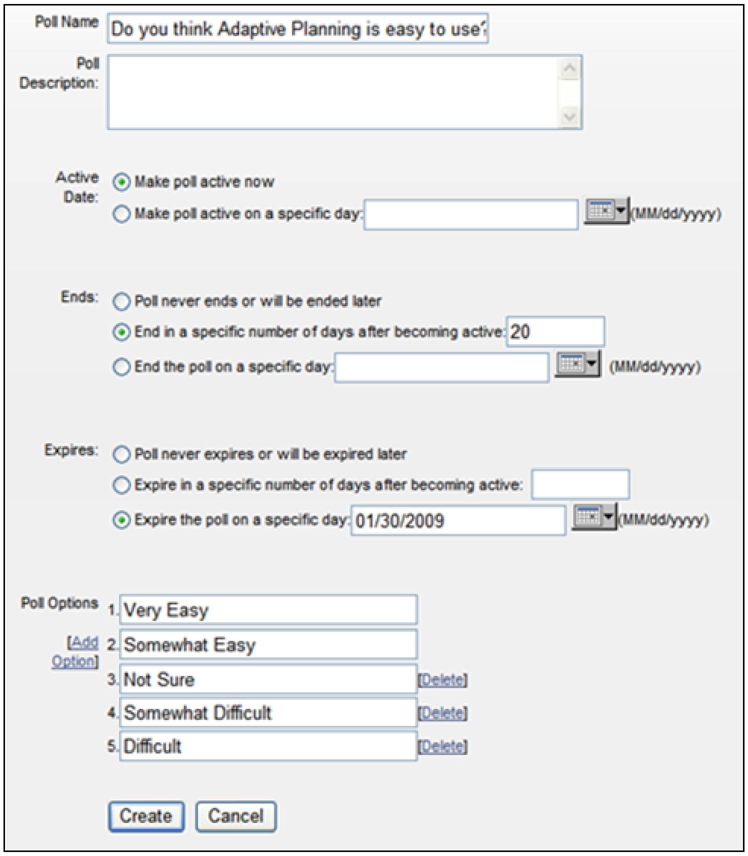
Creating a New Poll

1. To create a poll, navigate to the community where you want the poll to live. Under Actions, click Create Poll.



2. Complete the following details on the Create a New Poll Page.

   - **Poll Name** and **Description**
   - **Active Date –** This is the date that the poll will be available for users to vote in the poll and view the results.
   - **Ends –** You can specify a date when users can no longer vote in the poll.
   - **Expires** - A poll will not be displayed after the date specified here.
   - **Poll Options –** These are the choices that the users can select from when voting in the poll. By default, there are two options, but you can click the *Add Option* link to add more than two choices.



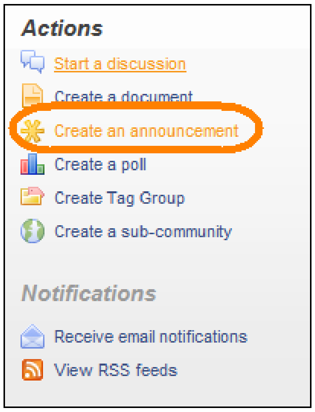
3. Once you have specified the details for the poll, click **Create**.

Create Announcements

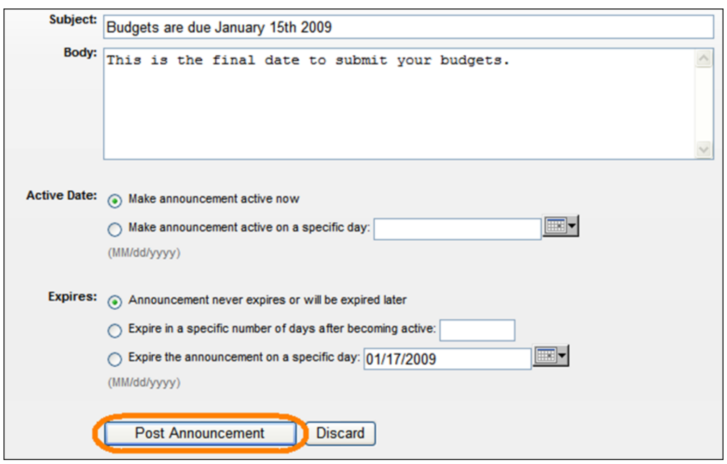
You can post an announcement that will appear on the home page for a particular community or sub-community. If there is important information you need to convey to the users, you could create an announcement.

Creating an Announcement

1. To create an announcement, navigate to your community's home page and click **Create Announcement.**

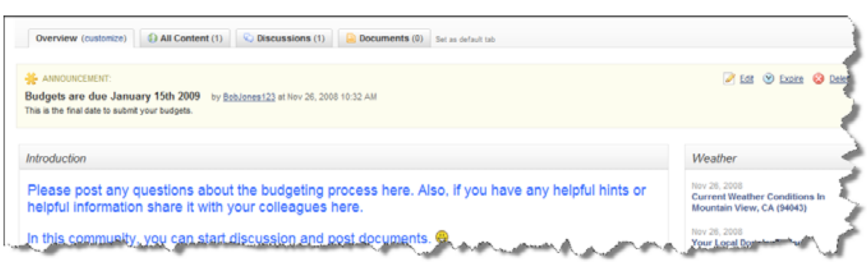


2. On the **Post Announcement** page, you can set the announcement text as well as when and for how long the announcement will be visible.



3. Click **Post Announcement**.

When you post an announcement, the announcement will appear at the top of the Overview page.



Create Tags and Tag Groups

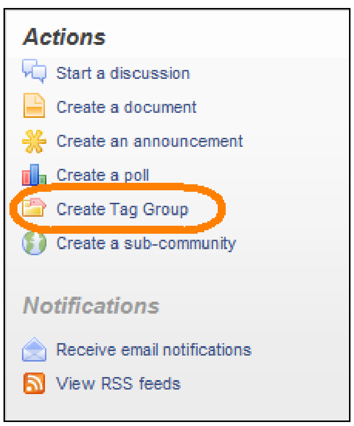
Tags are like index keywords you and others assign to content and use to look for content. When you create or edit content, it is a good idea to make sure that the list of tags assigned to the content accurately describes the content. One way to do this is to ask yourself what tags you would use to look for this content if you were searching for it. Both regular users and Space Administrators can tag content.

Tag groups collect tags so that you can find content by or assign all of the collected tags at once. For example, if you wanted to browse content via a tag group that collected the tags Budget 2009 and Personnel, you would get all content to which either tag had been assigned (rather than, say, any content to which *both* tags had been assigned). Only Space Administrators can create Tag Groups.

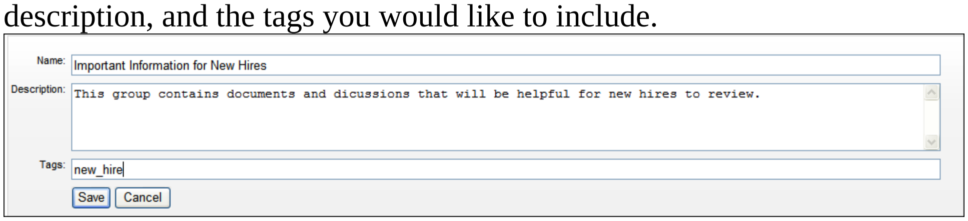
As a general rule, always try to make sure that content you edit has a useful set of tags and tag groups assigned to it.

Creating a Tag Group

1. To create a tag group, navigate to the space's home page and click **Create Tag Groups.**



2. On the **Create Tag Group** page, you can specify the name of the tag group, a description, and the tags you would like to include.



3. Click **Save** to create the tag group.

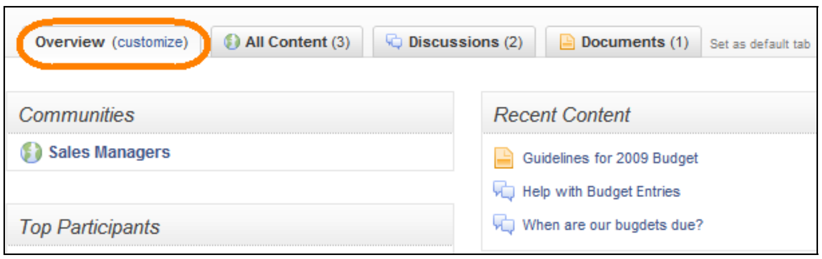
Customizing the Overview Page

The main community and any sub-community features an Overview tab that an Administrator can customize using widgets. As shown below, you can drag widgets into the overview design space to add views on content in the space — or even from elsewhere on the Internet.

Quick Steps

Here is the quick-and-easy look at designing a page with widgets.

1. To start customizing the Overview tab, click on the (customize) link in the Overview tab.



2. The Collaboration feature will display a layout screen with a set of widgets listed at the top and a default layout beneath it.
3. In the layout area beneath, find widgets you do not want displayed on the page and click their Remove button (that is a red X in the widget's upper right corner).
4. In the widgets list above, find widgets you want and drag them onto the layout area.
5. Tailor a widget to your needs by clicking its Edit button (the little pencil in the widget's upper right corner).
6. In the widgets list above click the Choose layout link to arrange your layout's columns.
7. Repeat steps 2 through 5 until you have what you want, then click Save.

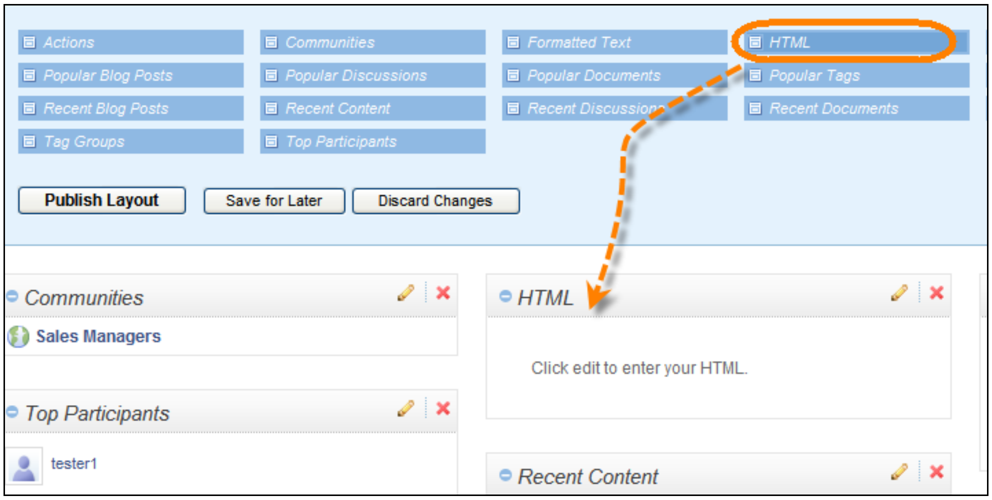
You'll probably spend a lot of time in your personalized Overview page, but if you ever want to see the full view of content again, click the **All Content** tab.

A Closer Look

You design pages by dragging and dropping widgets, then setting their properties. Here are a few widget features you can use to get your page design looking the way you want it.

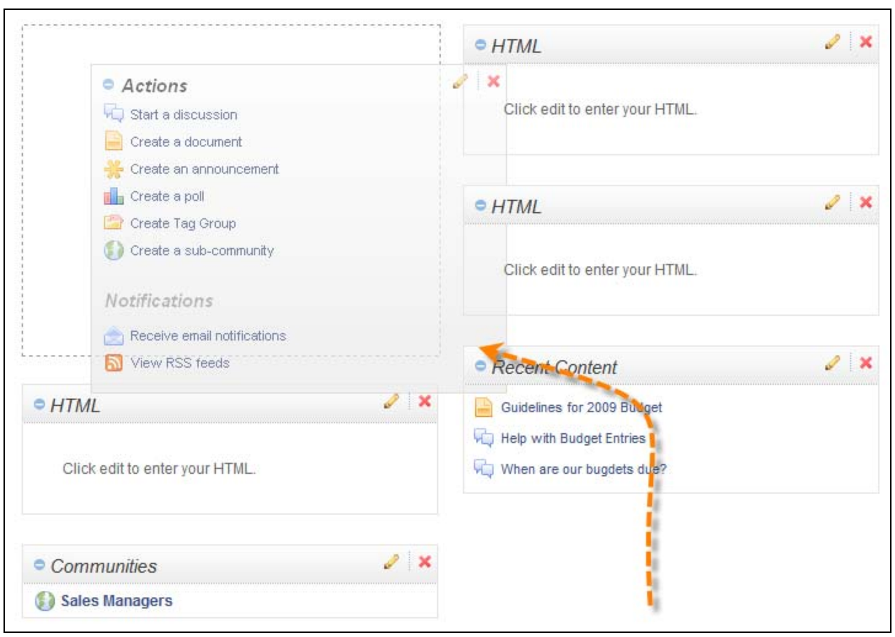
Drag and Drop

You drag widgets from the top of the page into your design.



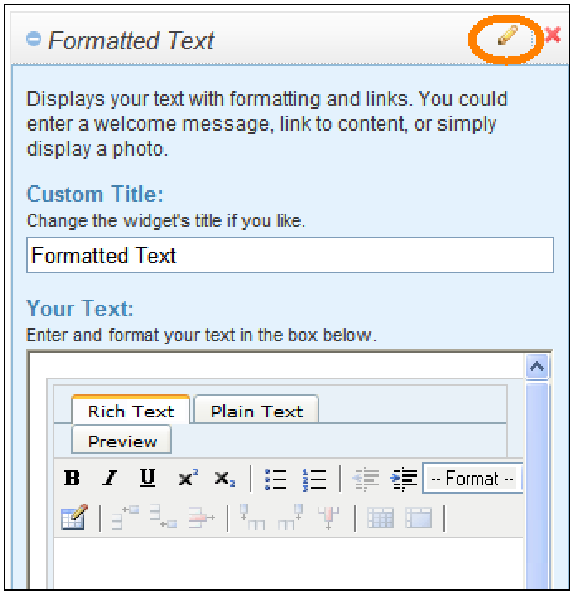
Change Position

If you want to change a widget's position, just drag it to another place in your design. Notice when you do that the widget's size and display style adapt to fit the new position.



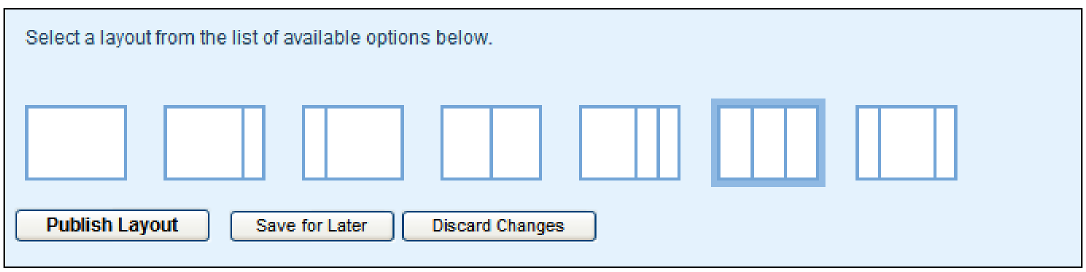
Edit Widget Properties

Click the widget's **Edit** link to change the name of the widget as it appears at the top. Many widgets also include other properties you can change to tailor how the widget looks. In the **Formatted Text** widget, for example, you also type in the text you want the widget to display, including links, images, and so on.



Choose a Layout

Click **Choose layout**, and then click the kind of layout you want to use. The Collaboration features rearranges your widgets to fit, but you should drag them around until you like what you see.

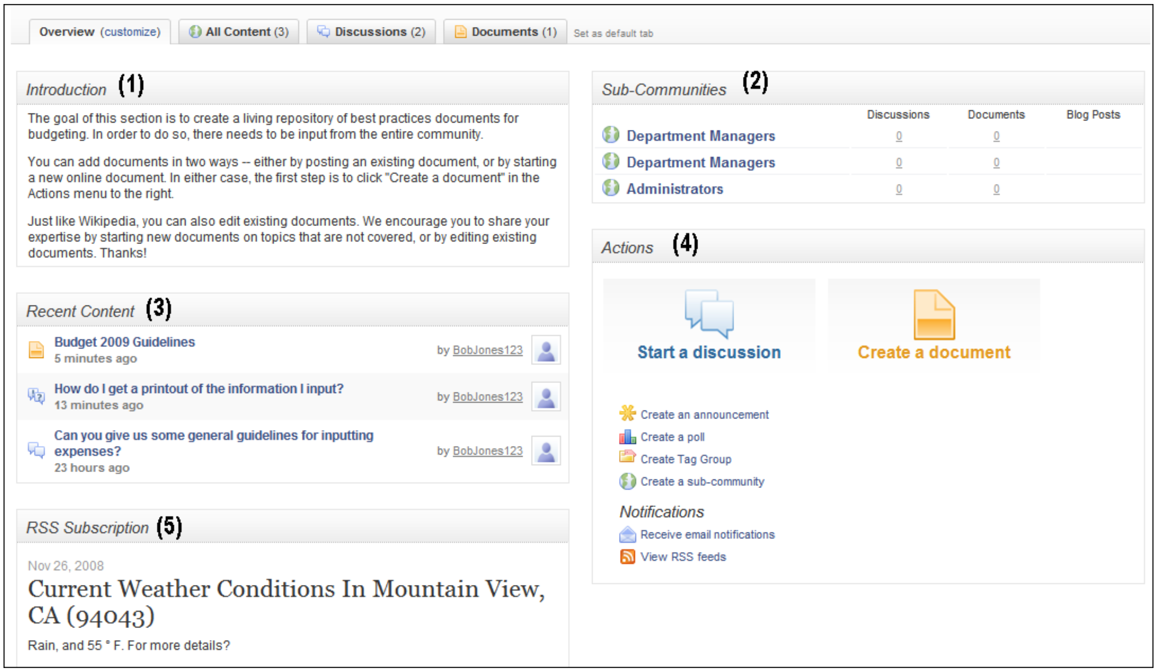


Take the Easy Way Out: Copy

If you are designing an overview page and you have seen another layout you like, you can just copy it for your own use. Click **Copy another space** to copy that layout as your own. You can then rearrange to suit your needs.

Widget Layout Example

Here is a simple example of a layout that brings together budget and planning information. This layout contains content from within the community and from another website.



Here is what people visiting the space will see:

- The most prominent content is the introduction to the space (1). The space admin can edit this content regularly to include new messages, highlight content in the space, and so on.
- The introduction is done through a Formatted Text widget (1). Note that the widget provides that same editing styles (rich text and plain text, with a preview) as other content editors in the Collaboration area.
- The sub-communities (2) that a user has access to are listed next to the introduction area.
- A Recent Content widget (3) displays links to content inside the space. This contains budget instructions and other discussions and questions about the budgeting process.
- Below the sub-communities, there is a list of actions that a user can perform(4). Note that the list of actions will vary based on whether the user is a regular user or a Space Administrator.
- Below the Recent Content widget is an RSS feed that contains weather updates. To get content from another site, the RSS Widget (5) takes a URL to the feed provided by the site. It then displays the feed's results.

Content Moderation

Moderators review content and make decisions about its appearance to other people. This can include editing or deleting content, and moving it from one community to another.

Content that can be moderated includes discussions, documents, and announcements.

Moderators have access to content features that other people do not have. All Space Administrators have access to moderate content. These features include links in the Actions list.

What Is Content Moderation?

Moderation is essentially keeping an eye on content in a space — and taking action when it's needed — to help make sure that the content is appropriate. For example, if discussion content is posted in the wrong sub-community, you can move it to the appropriate community. You can also delete a post or edit a post that contains offensive language.

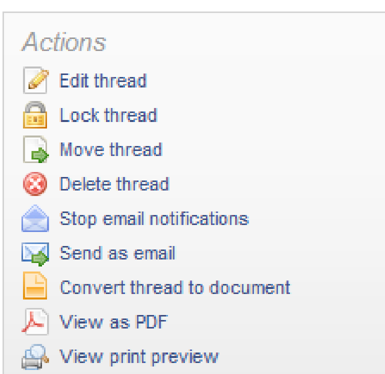
A content moderator acts on content as needed to adjust how content is available in the community.

Who Moderates What?

Space Administrators can moderate any content within the private community including all sub-communities.

Acting On a Single Piece of Content

As a moderator, you have access to a few commands for individual pieces of content that others do not have. These commands show up as links in the Actions list (as shown in the following illustration); some appear on the content itself.



Here is a list of the kinds of things you can do, along with the kinds of content for which they are available.

Action	Content Type
Editing the content, such as to remove abusive language or sensitive information.	Discussion threads and replies, and documents
Moving the content to another space.	Discussion threads, documents
Delete the content.	Discussion threads and replies, and documents
Branching the thread from a particular reply. When thread topics drift, you can branch the thread to create a new thread based on the "off topic" message.	Discussion threads and replies
Lock a discussion thread to prevent further posts.	Discussion threads

Best Practices

As a Space Administrator, you probably have more contact with more of the content than other people do. You have an opportunity to talk with people who are posting content (or thinking about it). You can suggest guidelines that help keep the community humming along (and avoid problems that require a moderator's hand). Here are a few things you can do.

Try to moderate lightly — instead, make the guidelines for discussions available and easily discoverable, then only moderate when a post is out of line or off topic.

Develop your usage policy — Design a usage policy to ward off abusive or inadvertent posts. Early warning can make a big difference, and can prevent people from having a negative experience. Make the consequences for unacceptable behavior clear. Some ideas for possible policy statements to include are:

- No profanity.
- Treat others with respect.
- Stay on topic.

When you enforce usage guidelines quickly and publicly (such as by removing or editing an offensive post), other community members are more likely to follow the guidelines.

Encourage people to mark replies as "Helpful" or "Correct" — this not only helps other people identify the content they need, but also identifies the responder as someone who might have useful answers.

Encourage people to tag content — Tags make content easier to find.

Understand the kinds of content that people use, and make suggestions where you think it might help — the following lists the main content types in the Collaboration area.

	Document	Discussion
Description	People can type a text document using rich text formatting.	People can make suggestions and comments or ask questions that others can respond to.
Use	Collect existing knowledge, document processes, create reports, best practices, and meeting notes.	Get feedback, report a problem, find a solution to a problem.
Tone	Formal, third person.	Informal, first person.