

Lithium Interactive Administrator's Guide

Implementing Ideas in Your Community

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Implementing Ideas in Your Community

Ideas—everyone has them and given the slightest encouragement, most people are willing to share theirs. If you ask them, your customers will tell you the enhancements and new features they want, the topics they’re interested in hearing about at your next user conference, or even what you should call a new product.

The challenge is to capture those ideas in a systematic way, identify the most important ones, and provide feedback and encouragement to keep the ideas flowing. Customers need to know that you are listening and acting on their best ideas. However, these are challenges that online communities in general and Lithium Idea Exchanges in particular are uniquely designed to meet. (Hey, we wouldn’t be spelling out the challenges if we didn’t have a solution.)

Whether you’re jump-starting a new community or adding a new dimension to an existing one, idea exchanges provide an easy way to embark on or extend the conversation with your customers.

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About Ideas and Idea Exchanges

An idea exchange is a place where community members can submit ideas, discuss them, and vote for the ones they like. To users of your community, key ingredients of an idea exchange are ideas, comments, and kudos (votes). Community members can post their ideas the same way they post messages, add comments the same way they reply to messages or comment on blogs, and vote for ideas by giving kudos.

Equally key to the success of an idea exchange are labels (either predefined or freeform) that help to organize what you hope will be an avalanche of ideas and feedback. Good conversations flow both ways, so feedback from the company in the form of status updates is an important way to let community members know that you not only value their input, but are willing to act on it as well.

In terms of community structure, an idea exchange is comparable to a forum or a blog, with ideas being analogous to messages or blog articles. You can display Ideas activity on leaderboards, in widgets throughout the community, or on your company's website. The tabbed front page of an idea exchange gives users three different perspectives on Ideas activity: most recent ideas, currently hot ideas, and all-time favorites.

» **Tip** If Ideas is your first foray into online communities you can find more information about communities in general and specific Lithium features in the *Administrator's Guide*.

Integrating Ideas into your community

Lithium Ideas is based on an outwardly simple idea of its own: give people a way to make suggestions, discuss them, and vote on the ones they like. However, the ways in which companies can use idea exchanges are anything but simple. Here are just a few ideas to get you started:

- Product enhancement ideas—solicit product suggestions and prioritize them based on real input from your customers.
- Buzz generators—attract users to your site with topical, short-term events, polls, contests, and other attention grabbers.
- Product naming contests—get customers engaged and excited about new products.

- Conference panel and keynote topics—make sure your upcoming conference covers the material your customers are most interested in.
- Opinion polls—propose some suggestions and let community members vote for their favorites.
- Service improvements—find out not only what your customers are looking for, but also what they are not particularly interested in.

As part of a community, idea exchanges offer a cohesive user experience—they look and behave just like the rest of the community. Community members can post ideas, add comments, give kudos, and apply tags the same way they do elsewhere. They browse ideas on a vote-driven front page or familiar leaderboards, and sort ideas by status, category, or tags.

Lithium Ideas shares a common platform and is tightly integrated with the rest of the community in other ways as well.

- Because good ideas can pop up anywhere, moderators can promote interesting nuggets from anywhere in the community—blog conversations, support forum questions, or elsewhere—to idea exchanges.
- Ideas use the same identity and reputation system as the rest of the community, which means community members can enhance their reputations (and earn Ideas-related privileges) by submitting useful ideas. The higher the users' kudos weight, the more votes they have.
- Users can search across the entire community—boards, blogs, and idea exchanges—transparently.
- Ideas have the same metrics system, management tools, and security features as the rest of the community. You configure and format them the same way as you do forums and blogs.

As a stand-alone offering, idea exchanges are an easy way to draw customers into a conversation. The barrier to entry is low: community members can vote on ideas with just a single click. From there, it's an easy migration to commenting on others' ideas and submitting ideas of their own. With the first feedback from the company, the conversation is off and running.

The importance of paying attention

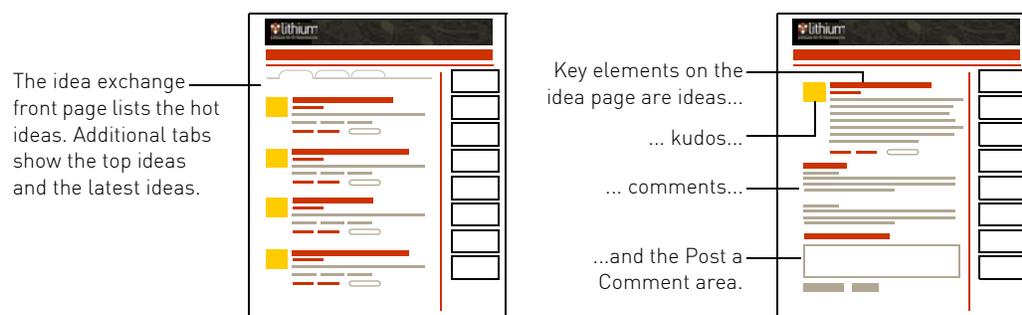
Nothing will cut off the flow of ideas faster than the perception that your suggestion box is suspended over a paper shredder, so it's important to let users know that the company is paying attention. However, paying attention in the context of Ideas is different than in the rest of the community.

Compared to other parts of an online community, Ideas requires a different level and quality of interaction between the company and the community. In a support forum, for example, you pay attention to the posts that are not receiving replies, questions that are not being answered. For Ideas, on the other hand, you need to monitor and respond to the ideas that garner the most kudos and comments. These are the ideas that have the most traction with your customers.

A second consideration is identifying who will respond to ideas and what commitments they can make on behalf of the company. As an online community matures, you can count on your super users (assuming you nurture them correctly) to monitor and respond to unanswered questions. Although super users can speak with authority about current products or features, they don't speak for the company and can't commit on behalf of the company to new products or features. Instead, the people you designate to respond to ideas must be able to speak for the company and must have the authority make commitments about changes to products or services.

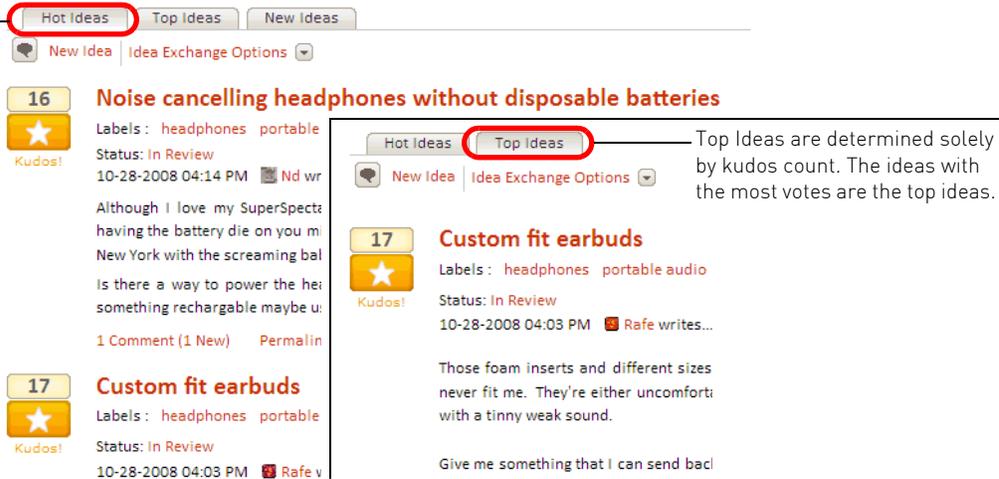
Anatomy of an idea exchange

An idea exchange is a collection of ideas in the same way a forum is a collection of messages and a blog is a collection of articles. In addition to ideas and kudos, idea exchange pages also contain labels, statuses, and comments (but only on ideas, not on other comments).



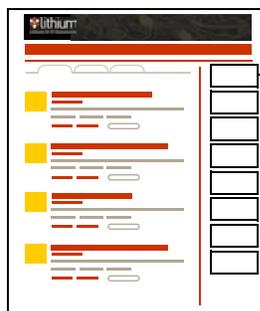
Three tabs across the top of the idea exchange page organize ideas based on when they were posted (New Ideas), how many kudos they've received (Top Ideas), and a secret mix of kudos, recent activity, and other criteria (Hot Ideas).

Hot Ideas are an ever-changing list of the ideas that are getting the most attention right now. Hot Ideas don't necessarily have the most kudos. Instead, we calculate hotness based on a mix of kudos, viewing activity, and other factors.



Top Ideas status is based entirely on votes (kudos count) over time, and **New Ideas** are simply listed in chronological order. **Hot Ideas** are determined by ongoing evaluation of kudos, viewing activity, and other factors. An idea doesn't need the highest kudos count to make it to the top of the Hot Ideas list.

The sidebar on the right side of idea exchange pages contains a configurable set of widgets that display information about ideas. Admins can add any of more than a dozen widgets that contain descriptions of the idea exchange, a list of labels, a list of statuses, top tags, top taggers, and other community data. Likewise, sidebar widgets elsewhere in the community can display the most recent or hottest ideas and other Ideas-related activity.



Sidebar widgets can include a description of the idea exchange, labels, statuses, custom widgets you create, and a dashboard for the idea exchange. You can also use widgets to display Hot Ideas or other Ideas activity elsewhere in your community or on your website.

These elements typically appear on an Ideas page.

Product Suggestions — The idea exchange name appears at the top of the page.

admin : Logout · My Profile · Dashboard · Help · Switch User

hi-fi : Ideas **Suggestions** — The idea exchange's short title appears in bread crumbs.

These tabs show the currently hot ideas, the all time most popular ideas, and the newest ideas. — Hot Ideas | Top Ideas | New Ideas

This is the hottest idea right now. — **16** **Noise cancelling headphones without disposable batteries**

Labels are a way to organize and sort ideas. — Labels: headphones portable audio

The status shows where this idea is on the way to being implemented. — Status: In Review

Readers click this link to read others' comments or to leave their own. — 1 Comment (1 New) Permalink

Readers click here to vote for this idea. — Kudos!

Although I love my SuperSpectacular noise having the battery die on you mid flight and New York with the screaming baby next to yo Is there a way to power the headphones th something rechargeable maybe using USB?

Although this idea has received more votes (kudos), it's not the hottest idea at the moment. — **17** **Custom fit earbuds**

Labels: headphones portable audio

Status: In Review

10-28-2008 04:14 PM Nd writes...

10-28-2008 04:03 PM Rafe writes...

Two other features that make Ideas unique are **labels** and **statuses**. Like blog authors, users who post ideas can add labels to their posts. However, you can require users to apply at least one label to each idea they post and either define labels in advance or let users create their own. Labels appear both on ideas and in a sidebar widget that community members can use to customize their view of ideas.

Labels allow users to filter their ideas list to a specific topic. — Labels: headphones (3) home theater portable aud

Showing ideas with label headphones. Show all ideas

When users click a label, the ideas list shows only ideas with that label. — **17** **Custom fit earbuds**

Labels: headphones

Status: In Review

10-28-2008 04:03 PM Rafe writes...

Those foam inserts and different sizes never fit me.

16 **Noise cancelling headphones without disposable batteries**

Labels: headphones portable audio

10-28-2008 04:14 PM Nd writes...

Although I love my SuperSpectacular noise cancelling headphones, nothing is worse than having the battery die on you mid flight

Fashionable earbuds!

Labels: headphones portable audio

10-28-2008 04:12 PM LtLlStA writes...

Status updates are a way for the company to give users public feedback on their ideas. By assigning a status, moderators can let users know which ideas are being reviewed or in the process of being implemented. This feedback is essential for keeping users engaged with the idea exchange. Like labels, statuses also provide a way for users to filter their view of ideas.

The Idea Statuses list shows the progression from new ideas to implementation.

Idea Statuses

- In Review (2)
- Underway (1)
- Being Tested (0)
- Done! (0)
- No, thanks (1)

17 Custom fit earbuds

Labels: headphones portable audio

Status: In Review

Status updates give users feedback from the company on their ideas.

You can also include social bookmarking on idea exchanges to help readers share ideas with their friends by means of any of dozens of shared bookmarking, social network, or other tracking services, such as Del.icio.us, Digg, Reddit, Facebook, MySpace, Google, StumbleUpon, Technorati, or Twitter. All that community members need is an account with the service and friends to share with.

1 Comment (0 New) Permalink Add Tag...

These are links to various social bookmarking sites. You can use any site for which you have an account.

BOOK-MARK

Bookmark & Share

- Favorites
- Del.icio.us
- MySpace
- Reddit
- Live
- Digg
- Google
- Facebook
- Newsvine
- More ...

Creating an idea exchange

Like other community elements, you can have as many idea exchanges as the traffic will bear. You can create an idea exchange anywhere in your community—at the top level or within any category. If you're using the idea exchange to attract traffic to the community, you may want to give it a place of prominence at the top level.

The mechanics of creating an idea exchange are simple: you specify a unique idea exchange ID, a title for the idea exchange, and whether to require labels to help organize ideas. You can change the title or the labels setting after the idea exchange is created. You can also add an idea exchange description and change other settings later, as well.

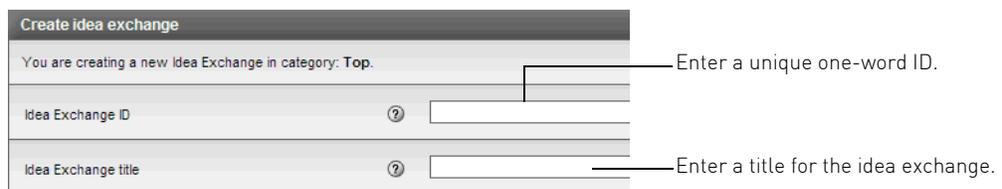
To create an idea exchange:

- 1 Choose **Community Options > Community Admin > Items and Categories**. If necessary, click **Manage Category** to reach the category where you want to create the idea exchange.
- 2 Click **Create idea exchange**.



- 3 Enter a unique ID and a title for the idea exchange.

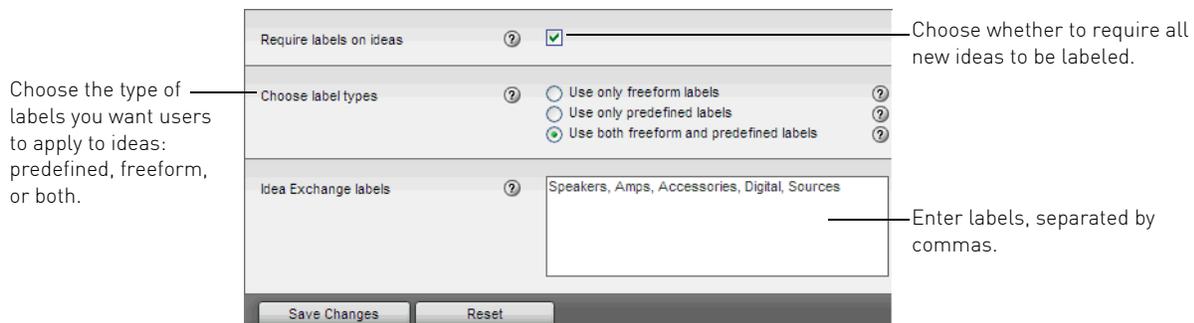
Like all other community IDs, the idea exchange ID must be a single word with no spaces and must be unique for your community. This means that you can't reuse the ID of a deleted idea exchange. You can use alphanumeric characters, dashes, and hyphens. The system uses the idea exchange ID to construct the idea exchange's URL.



- 4 Enter a title for the idea exchange.

The idea exchange title appears in the community pages and in your browser's title bar.

- 5 Choose whether to require users to add labels to an idea before posting it.
- 6 If you require labels, choose whether users can create their own labels or if they must use the labels you define.



You can restrict users to the labels you define below, let them create their own labels, or both. You can choose the option that gives you the degree of structure you want for each idea exchange.

- **Predefined:** By defining the number and content of the labels, you provide a framework and context for the idea exchange before the first idea is posted. This may discourage users from contributing ideas that are not related to the labels you've defined. You might use predefined labels, for example, to collect feedback on several products in one idea exchange until you have sufficient traffic to warrant multiple idea exchanges.
- **Freeform:** With freeform labels, the result is more akin to tags with their bottom-up, organic view of your idea exchange.
- **Both:** Allowing users to choose a label or create their own gives them a framework to follow if they choose plus a measure of flexibility.

» **Note** Unlike tags, which must consist of a single word, freeform labels can contain spaces and punctuation.

- 7 Enter labels (separated by commas) you want community members to use to categorize ideas in this idea exchange.

Users see labels listed in the same order as you enter them here. You can change your mind later about whether labels are required or what type of labels are required. You can also add or remove labels as needed. Any changes you make will affect only new ideas that are posted after you make the change—ideas that already have a label will retain it after you delete the label.

- 8 Click **Create Idea Exchange**.

Setting idea exchange options

Although idea exchanges and blogs serve different purposes in a community, under the hood they share a common architecture. Like blogs, idea exchanges have a series of settings that determine how they look and behave. And like blogs, you can set default options at the community or category level and then override them as needed for individual idea exchanges. For example, you might allow both freeform and predefined labels as the default for all idea exchanges, but choose predefined labels for selected idea exchanges.

These are the major categories of settings that affect idea exchanges.

Use these settings To do this

Idea Exchange	Enable idea exchange-specific features, such as labels and statuses; enter descriptive text; define statuses; and choose an idea exchange skin. See Choosing idea exchange settings , next and Creating and managing statuses on page 12.
General	Choose idea exchange options for user profile, feature, tagging, kudos, spelling checker, and attachment settings. See Choosing general idea exchange options on page 15.
Layout	Choose colors, fonts, images, and other settings that affect the appearance of an idea exchange. Choosing idea exchange styling and content on page 20.
Metrics	View metrics for the selected idea exchange. Viewing Ideas metrics on page 29.
Polls	Add a traditional (anonymous) poll to an idea exchange or view existing polls.
User Management	Change idea exchange-specific permission settings. See Setting idea exchange permissions on page 27.

Choosing idea exchange settings

Idea exchange settings control much of the behavior and appearance of the idea exchanges in your community. You typically set community-wide defaults for all of your idea exchanges and override specific settings locally for individual idea exchanges. For example, you might choose both freeform and predefined labels as the default for all idea exchanges, but ask community members to use only predefined labels for a selected few.

Using these settings, you can determine the number of ideas and comments per page, whether users are required to apply labels to ideas before posting them, and the type of labels they can use. You can define a set of labels to use as your defaults throughout the community and add or remove labels for each idea exchange. Each idea exchange has its own status definitions as well as a short title, short and detailed descriptions, and keywords.

To choose idea exchange options for a specific idea exchange:

- 1 Choose Idea Exchange Options > Idea Exchange Admin > Idea Exchange Settings.

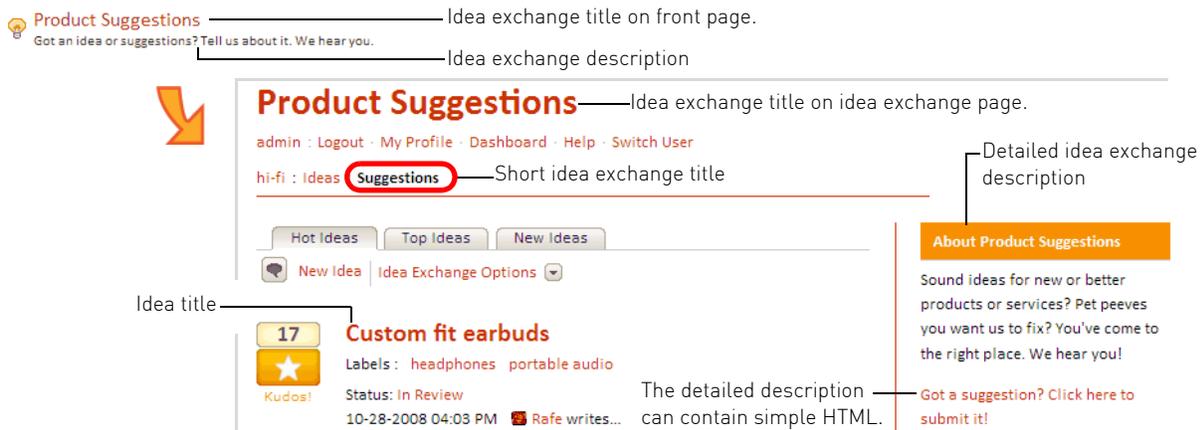
With the exception of **Turn on idea status**, you can choose any of these settings as either community defaults or for individual idea exchanges. You set **Turn on idea status** only for an individual idea exchange.

- 2 Enter information that identifies and describes the idea exchange (these are idea exchange-specific settings).

This information **Appears here**

Short idea exchange title	In bread crumbs (navigation links) and elsewhere in the community. If you don't enter a short title, the full title appears instead. A short title is useful when the full title is too long to fit comfortably in navigation. If the idea exchange title is already brief, you can forego a short title.
Idea exchange description	Below the idea exchange title in listings of the idea exchanges available in the community. The system formats this text automatically based on the community skin. This is most useful for distinguishing multiple idea exchanges at the top level of the community or in the same category.
Detailed description	In a widget in the right sidebar of the idea exchange page. You can use these basic HTML tags to format the description: <blockquote>, , , , <hr>, <i>, <pre>, <strike>, and .
Idea exchange Keywords	To help third-party search engines index this idea exchange.

The idea exchange title appears on the community front page and at the top of all idea exchange pages.



You can change the idea exchange title if you wish.

- 3 Click check boxes or enter values for the remaining settings.

With the exception of the first setting, which is local only, these settings can apply to specific idea exchanges or to all idea exchanges in a category or community.

This setting	Does this
Turn on Ideas status	Turns on the status feature, which displays a status for each idea. Community members can click a status to display only the ideas that have that status. Note: This is a local setting—it only applies to the current idea exchange.
Number of articles per page	Sets the number of ideas that appear on each page. Users click navigation links to see additional ideas.
Number of comments per page	Sets the number of comments that appear on each page. Users click navigation links to see additional comments.
Require labels on ideas	Requires users to enter or choose a label before they can post an idea.
Choose label types	Specifies the kind of labels community members can use: freeform (anything the user wants), predefined (set up in advance), or both. The default is the community-wide setting, but you can choose another setting for this idea exchange.
Idea Exchange labels	Defines the labels that are available for this idea exchange. The default is the set of labels defined for the community. You can add or remove labels for this idea exchange.

- 4 Scroll down to the bottom of the page and click **Save Changes**. Click **Reset** to restore the default settings.

Creating and managing statuses

Idea statuses serve two functions in an idea exchange. First, they provide all-important feedback from the company to community members. Second, they work as a filter and give users a way to sort ideas. Clicking a status name—either in an idea or in the list of statuses—limits the ideas list to just that status and filters out all ideas that have a different status. Users can use this filter to see which ideas the company is working on implementing. A moderator could use it to look for ideas that may have been ignored.

Each idea exchange has its own set of statuses, but you can reuse the same ones from one idea exchange to the next. The statuses you create depend on the purpose of the idea bank. If you're soliciting product ideas, your statuses should reflect a progression from new idea, through review, to eventual implementation. For a long-running contest, on the other hand, you might use statuses to place time frames on entries. For still other idea exchanges, short term popularity or event-driven polls, you might define a single default status that thanks users for entering the content, or not define any statuses at all.

» **Note** Each idea exchange has an invisible system default status, Unspecified. New ideas automatically receive this status as soon as they are posted. If you replace this default status with another one, users see the default you've defined. If you leave Unspecified as your default, new ideas don't appear to have a status.

To create a status:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > Idea Statuses**.

The Idea Statuses page displays the system default status, Unspecified.

Idea Statuses					
	Action	Status ID	Status Name	Delete	Default
1	EDIT	unspecified	Unspecified	Required Status	Yes
Create a New Idea Status					

Each idea exchange starts with the same default status.

- 2 Click **Create a New Idea Status**.

Create Idea Status	
Idea Status ID	<input type="text"/>
Idea Status Name	<input type="text"/>
Make this the default status	<input type="checkbox"/>
<input type="button" value="Save Idea Status"/> <input type="button" value="Reset"/>	

The status ID must be a single word and must be unique for your community.

The status name is visible to users.

You can designate any status as the default.

- 3 Enter a status ID.

The status ID must be a single word with no spaces and must be unique for your community. This means that you can't reuse the ID of a deleted status. You can use alphanumeric characters, dashes, and hyphens.

- 4 Enter a status name.

Users see the status name (if it's anything other than the system default).

- Choose whether this is the default status given to all new ideas when they are posted.

The default status is given to all new ideas when they are posted. You can use the system default, Unspecified, or assign a different default status. The Unspecified status doesn't appear on the idea (the status area is blank), but users do see the status if you use a different default.

- Use the up and down arrows in the Action column to change the order of statuses in the list.

The order in which statuses are listed implies a progression that ends when an idea is either implemented or rejected. This is also the order in which statuses appear on the idea exchange pages.

Use these arrows to move a status up or down in the list.

Idea Statuses		
	Action	Status ID
1	 EDIT	Status03
2	 EDIT	Status02

- Click **Save Status Idea**.

To edit a status:

- On the Idea Statuses page, click the **Edit** button for the status.

You can change the status name or whether it is the system default, but not the status ID.

- Make any necessary changes and click **Save Idea Status**.

To delete a status:

- On the Idea Statuses page, click the **Delete** button for the status.

You can delete any status that you've created, but not the system default Unspecified status. Ideas with the deleted status revert to the default status.

5	 EDIT	Status04	No, thanks	DELETE	Click to delete a status.
6	 EDIT	unspecified	Unspecified	Required Status	You can't delete this status.

Choosing general idea exchange options

Idea exchanges have their own user profile, feature, tagging, kudos, spelling checker, and attachment settings that override community wide settings. For the most part, you can leave these settings as is. The only time you'd need to change a setting is if you want a feature to behave differently in an idea exchange than in the rest of the community.

Use these settings	To do this
User Profile Settings	Set the character encoding, time zone, and refresh interval for users when they visit this idea exchange. See Choosing default user profile settings , next.
Feature Settings	Select settings that control whether users see a confirmation page after they post an idea or a comment, whether subscriptions and RSS are enabled, time limits for editing a post, and comment size limits. See Choosing feature settings on page 16.
Tagging Settings	Turn on tagging, tagging leaderboards, and a top tags cloud for the idea exchange. See Choosing tagging settings on page 18.
Kudos Settings	Turn on kudos leaderboards and other kudos displays for this idea exchange. Because kudos are so integral to Ideas, the feature is turned on by default for all idea exchanges. You can, if you wish, turn kudos off for specific ideas as needed. See Choosing kudos settings on page 18.
Spelling Checker Settings	Determine whether the spelling checker will learn new words, ignore numbers, and ignore capital letters for ideas and comments. See Choosing spelling checker settings on page 19.
Attachment Settings	Determine whether this idea exchange will have different attachment rendering and size limits than the rest of the community. See Choosing attachment settings on page 20.

Choosing default user profile settings

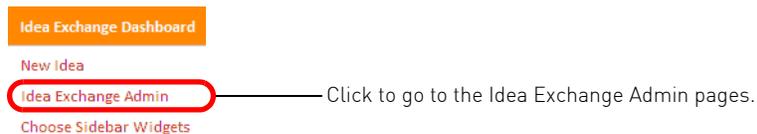
You can set a few of the user profile settings for idea exchanges. These settings become the default user profile settings for a specific idea exchange. A user's personal settings for time zone and refresh interval override both community and local (idea exchange) defaults.

- » **Tip** Chances are, you'll want to simply leave these options set to the community defaults.

To choose default user profile settings:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > General Settings > User Profile Settings**.

You can also click the link for **Idea Exchange Admin** in the Idea Exchange Dashboard, and then choose **General Settings > User Profile Settings**.



- 2 In the Locale Settings section, enter the type of character encoding to be used for output for this blog and choose a time zone.



- 3 At the bottom of the section click **Save Changes**. Click **Reset** to restore the default settings.
- 4 In the General Usability Settings section, enter an interval for automatic page refreshes. Enter a 0 to turn off automatic page refreshing.
- 5 At the bottom of the section click **Save Changes**. Click **Reset** to restore the default settings.

Choosing feature settings

Idea exchanges have a series of feature settings that enable or control some of the features available to users.

To choose feature settings:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > General Settings > Feature Settings**.

- 2 Click check boxes or enter values for these settings.

This setting	Does this
Show confirmation page for a successful post	Displays a confirmation page after a successful post. The confirmation page contains links to the idea exchange and idea. If this setting is turned off (unchecked), users return to the New Ideas tab on the idea exchange page instead. This is a convenience that users appreciate.
Turn off subscriptions	Prevents all users except Admins from subscribing to an idea exchange. You might choose this setting if you have strict email policies or if you don't have access to email addresses.
Turn off Smileys inside <pre> tags	Prevents certain character combinations that fall within preformatted text from being displayed as smileys.
Turn on Recent Ideas module	Displays the most recent ideas for an idea exchange or other level in the community.
Turn on RSS	Enables users to activate an RSS feed from the Idea Exchange Options menu. This is a nice convenience for users.
Time limit for editing posts	Sets the amount of time (in minutes) during which users can edit their own posts (if the appropriate permission is set). If set to 0, users can edit their posts at any time. If set to 60, users must complete their editing within 60 minutes.
Maximum number of characters in subject	Sets the maximum length (number of characters) for the subject of an idea. It's reasonable to set the same limit for board, blog, and idea subjects.
Maximum number of characters in post	Sets the maximum length (number of characters) for the body of an idea. You may want to set this limit higher for ideas than for messages so that community members have more space in which to explain their ideas. As a rule of thumb, five characters equals a word. A limit of 20,000 characters, for example, translates to 3,333 words (the space between words also counts as a character). For reference, an average newspaper column is between 750 and 1,000 words. A 10-page short story is 2,500 words.
Skip Idea metrics	Determines whether to increment metrics for ideas in this idea exchange.

- 3 At the bottom of the page click **Save Changes**. Click **Reset** to restore the default settings.

Choosing tagging settings

Tagging is a popular community feature that lets users apply their own descriptive words (tags) to articles, messages, and ideas. For idea exchanges, you can choose whether to allow users to apply tags to ideas, and whether to display top taggers leaderboards and a top tags cloud. You can display the leaderboard and tag cloud in the sidebar on the right side of the Ideas page.

There's an overlap, to some extent, between tags and freeform labels. One key difference is that tagging is always optional, whereas you can require users to apply labels on their ideas. A second key difference is that tags must always be a single word, but freeform labels can include spaces and punctuation. You might, for example, turn tagging on for idea exchanges that don't require labels or those that use predefined labels, and turn it off for idea exchanges that use freeform labels.

As they do elsewhere in the community, tags give users a way to organize ideas for themselves, with all the benefits a bottom-up taxonomy provides. For more information about tagging leaderboards and tag clouds, see the tagging section of your *Administrator's Guide*.

To choose tagging settings:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > General Settings > Tagging Settings**.
- 2 Choose whether to turn on tags for this idea exchange.
You might enable tags as the default, but disable tags for an idea exchange that uses freeform labels.
- 3 If you enable tags, choose whether to enable the top taggers leaderboard and tag cloud.
- 4 At the bottom of the page click **Save Changes**. Click **Reset** to restore the default settings.

Choosing kudos settings

Kudos are a key element in an idea exchange: users vote for the ideas they like by giving kudos. For this reason, kudos are always turned on in an idea exchange. You can, however, choose whether to enable the three kudos leaderboards, set leaderboard time ranges, and exclude certain roles from leaderboards. Once you enable the leaderboards, you can choose where to position them on idea exchange pages (see **Choosing sidebar content** on page 23 for more information).

» **Tip** For more information about kudos leaderboards, see the kudos section of your *Administrator's Guide*.

To choose kudos settings:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > General Settings > Kudos Settings**.
- 2 Choose whether to enable the **Top Kudoed Authors**, **Top Kudoed Posts**, and **Top Kudo Givers** leaderboards.
The Top Kudoed Authors leaderboard shows who is contributing the most popular ideas.
- 3 For each leaderboard, choose a time range and enter any roles to be excluded.
Communities typically exclude administrators and moderators from kudos leaderboards.
- 4 Choose whether to exclude certain posts from the kudos leaderboards.
Even though ideas are likely to garner more kudos than other areas or a community, it's still a good idea to show leaderboards everywhere (the setting is **None - allow everywhere**). Communities thrive on activity and a lively idea exchange with lots of kudos shows that the community is hopping.
- 5 Choose whether to enable the **Who Kudoed this Post** page.
- 6 At the bottom of the page click **Save Changes**. Click **Reset** to restore the default settings.

Choosing spelling checker settings

Three settings let you customize the spelling checker for idea exchanges. It's highly unlikely, however, that you'd want to do so.

To choose spelling checker settings:

- 1 Choose **Blog Options > Blog Admin > General Settings > Spelling Checker Settings**.
- 2 Choose whether to disable the spelling checker's ability to learn words.
A user's learned words are stored in a browser cookie on the user's system.
- 3 Choose whether to ignore words that contain numbers or words that are all upper case.
- 4 At the bottom of the page click **Save Changes**. Click **Reset** to restore the default settings.

Choosing attachment settings

If you allow attachments in your community, you can set different attachment limits for ideas than for blogs or boards. You might, for example, want to render attachments as HTML images for ideas and boards, but retain them as links on blogs to conserve space.

To choose attachment settings:

- 1 Choose **Idea Exchange Options > Idea Exchange Admin > General Settings > Attachment Settings**.
- 2 Change any of the attachment settings as needed.
The default values for blogs are the same as those in the rest of your community.
- 3 At the bottom of the page click **Save Changes**. Click **Reset** to restore the default settings.

Choosing idea exchange styling and content

Although idea exchanges inherit their styling from the basic skin and layout setting for the rest of your community, you can apply special styling and formatting to make your idea exchanges stand out. You can choose a palette of colors that's unique to idea exchanges or a subtle reinterpretation of the colors you already use. You can also make the text distinctive with font choices and replace the standard images for buttons and navigation elements.

» **Note** Although a special palette is available for text and color styling, you can choose images or a skin or add custom layout settings the same way for idea exchanges as you do for the community as a whole. See “Configuring the appearance of your community” in the *Administrator's Guide* for more information.

All Ideas pages contain a customizable sidebar along the right side of the page that contains a series of widgets—mini-lists of content that pertain to the idea exchange or to the entire community. Examples of widgets are kudos and tagging leaderboards, labels, statuses, and tag clouds. Not only can you choose the widgets that appear in the sidebar, but you can also choose the order in which they appear.

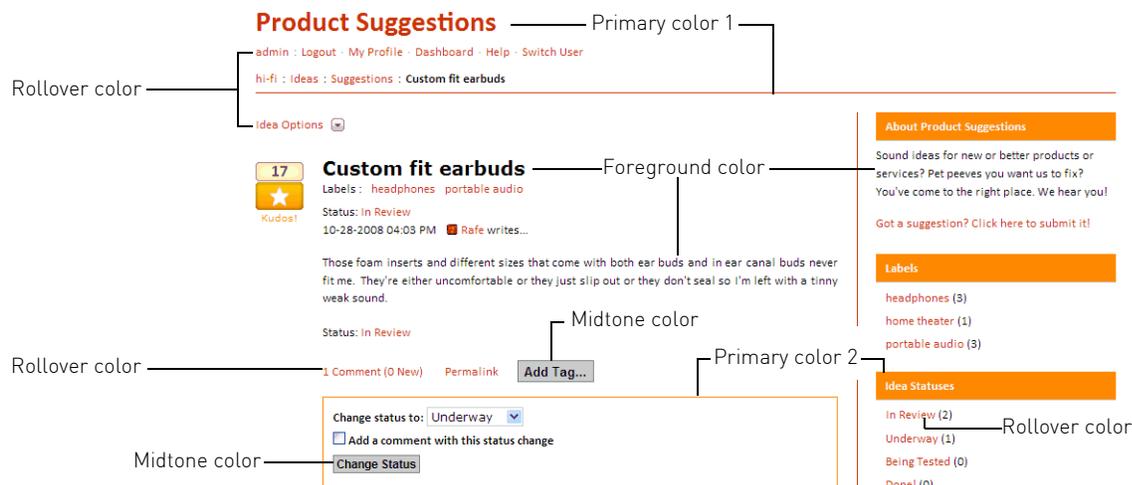
Check out these topics:

- [Choosing idea exchange colors and fonts, next](#)
- [Choosing sidebar content on page 23](#)

Choosing idea exchange colors and fonts

Rather than choosing from literally hundreds of color and text settings, you can work with a small palette of color and font choices to give your idea exchanges a distinctive look. For example, you can change the background or text colors, make text smaller or larger, or use different colors for highlights on idea exchange pages. If you customize the layout settings for an idea exchange, these settings override your community default skin.

Because of the way in which the colors in the palette are applied, a few simple changes can make a dramatic impact on the appearance of an idea exchange. For example, the Rollover color is used for all link text—ideas titles on the front page, navigation links, links for comments, labels, tags, statuses, and menu titles. For this setting, then, it's a good idea to use a pleasing, easy-to-read color rather than a pastel.



Likewise, a few simple changes to the font settings can give each idea exchange a distinctive look. For example, you can start by changing the body font, and then adjust the font sizes, weights, and line heights of up to four levels of titles.



In all probability, you'll want to experiment with the various color and text settings to get the results you are looking for.

» **Tip** Once you get your text and color settings just the way you want them, you can ask your CSM (Customer Success Manager) to export your settings and save them as an idea exchange skin.

To choose idea exchange colors and fonts:

- 1 Go to the idea exchange page and choose **Idea Exchange Options > Idea Exchange Admin > Layout Settings > Palette**.
- 2 Change the color settings as needed.

Use the six-character HTML color specification to indicate the colors you want to use. These are the color settings you can choose.

This color choice Affects this area

Background Color	The background of the page. If you use a dark background, make sure that all text elements are either white or a very light color.
Foreground Color	Text that isn't otherwise defined: this is effectively your default text color, but it might be used for decorative elements as well. Make sure that your background and foreground colors work together. For example, if you choose a light background, the foreground color should be dark.
Midtone Color	Background areas such as button and menu backgrounds. The best choice is a neutral color on which both black and white text are readable.
Primary Color 1	Important accents, such as the page title and major borders or dividers.
Primary Color 2	Secondary spot color accents, such as borders between sidebar widgets.
Rollover Color	Any text that's also a link. This includes navigation links, titles, tag, labels, hyperlinks, and so forth.

- 3 Change the font settings as needed.

The font specification follows the format used in the HTML style element, with a semicolon and space after each part. Line height is the total amount of area that a line of text occupies, including the space between one line and the next.

`font-family:Calibri; font-weight:normal; font-size:11px; line-height:14px;`

This font choice Affects

Body Type	The basic body text in blog articles and sidebar widgets
Title Type 1	Top level headings, such as page titles
Title Type 2	Second level headings, such as article titles
Title Type 3	Third level headings, such as sidebar widget titles
Title Type 4	Minor headings, such as navigation and breadcrumb links

» **Tip** Although you can use a different font family for every title level, the results may not be particularly attractive (think ransom note). Also, remember that most users find sans serif fonts (Arial or Verdana, for example) easier to read online than serif fonts (Times Roman, for example).

- 4 Scroll down to the bottom of the page and click **Save Changes**.

Choosing sidebar content

Each idea exchange page contains a sidebar on the right that can display Ideas-specific content as well as information from elsewhere in the community. The content is displayed in widgets—small, self-contained capsules that you can show, hide, or rearrange as you choose. You select and arrange the sidebar widgets for each idea exchange separately.



— Sidebar widgets can include an idea exchange description, labels, statuses, tag and kudos info, and the Idea Exchange Dashboard. You can also display custom widgets that you define.

In addition to the standard widgets available to all communities, you can also create custom widgets that display any sort of information you choose. For more information, see the Custom Widgets section of your *Administrator's Guide*.

To choose sidebar content:

- 1 Click **Choose Sidebar Widgets** in the Idea Exchange Dashboard (in the sidebar). If the Idea Exchange Dashboard is hidden, choose **Idea Exchange Options > Choose Sidebar Widgets**.

The list of available widgets appears on the left side of the page, and the sidebar area on the right becomes a layout preview where you can position, move, and delete widgets as needed.

- 2 To preview the content of a widget, open a widget category and click a widget.

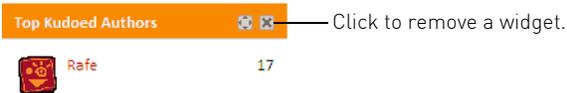
The Widget Preview area at the bottom of the Widget List shows the content, if any, for the current idea exchange. Not all widgets have applicable content for all idea exchanges. For example, the Top Tags widget contains no content until readers apply tags to ideas.

- 3 To add a widget to the sidebar, drag the widget by its handle to the sidebar.

4 To move a widget, grab its handle and drag the widget to a different location in the sidebar.

5 To delete a widget, click its close button.

The widgets you delete are never lost. You can always refresh the Widget List and add a widget you've deleted.



6 To save the new sidebar arrangement, click **Save Layout**. To return to the default sidebar layout, click **Reset**.

7 Click **Close Widget List** when you're finished.

Managing idea exchanges in a community

When it comes to managing ideas, you'll find that idea exchanges are virtually identical to forums in some respects, and very different in others. Moderators use the exact same tools to edit, move, delete ideas as they do messages. Likewise, the tools for managing kudos, handling bookmarks and subscriptions, emailing and printing ideas, and so forth are identical to those on forums.

The key difference is in the type of attention and responsiveness that idea exchanges require. In support community forums, for example, moderators typically escalate questions that haven't received a reply in a given period of time. In an idea exchange, you're more likely to escalate the ideas that are most active. Another differentiating factor is the importance of providing feedback and closing the loop with community members who post ideas.

Contact your Customer Success Manager (CSM) for more guidance on moderating and managing idea exchanges.

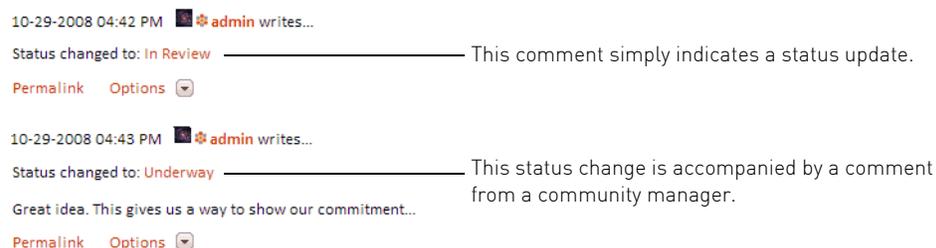
Check out these topics:

- [Updating the status of an idea, next](#)
- [Blocking kudos or comments on an idea on page 27](#)
- [Setting idea exchange permissions on page 27](#)
- [Incorporating Ideas activity into user rankings on page 28](#)

Updating the status of an idea

In addition to being a way to organize and filter ideas in an idea exchange, statuses provide feedback to users about how the company views their ideas. Each new idea is automatically assigned the default status when it is posted—either the invisible default, Unspecified, or one that you define.

You can provide feedback both by changing the status of an idea and by leaving a comment to accompany the status update. With the exception of Unspecified, all status updates are public. Admins, moderators, and others who might have the appropriate permission can change the status of an idea. Each status change appears as a comment on the idea.



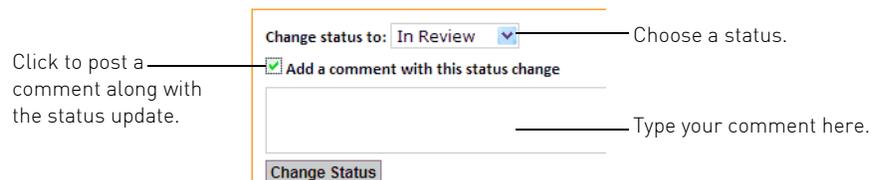
To update the status of an idea:

- 1 Go to the idea. In the Change Status area, choose the new status.

You can choose any status, either higher or lower, that isn't already assigned. For example, if the company discovers that an idea needs more research before it can be implemented, the status might change from *Underway* to *In Review*.

- 2 Click the **Add a comment** check box if you wish.

A comment area appears when you click the check box.



- 3 Type your comment and click **Change Status**.

The new status appears at the top of the idea and at the end of the comments.



Blocking kudos or comments on an idea

Unlike boards, where a single thread can run for months or even years, ideas tend to have a short shelf life. As a result, moderators may want to cut off kudos or comments to an idea after a certain period of time has elapsed. Turning off kudos effectively ends the voting on an idea and gives other ideas a chance at the Top Ideas and Hot Ideas limelight. You might, for example, block additional kudos on a popular idea that you've decided to implement or on ideas that are ready to be moved to a non-voting "All Time Hits" idea exchange. Likewise, turning off comments retains any existing comments, but prevents users from adding new ones. Community members can still see existing kudos or comments.

To block kudos on an idea:

- ◆ Choose **Idea Options > Freeze Kudos for this Idea and Comments**.

Community members can see existing kudos, but the **Kudos!** button is no longer active.

To block comments on an idea:

- ◆ Choose **Idea Options > Prevent Additional Comments**.

Community members can see existing comments, but the Post a Comment form is no longer available.

Setting idea exchange permissions

The Lithium system has a series of permission settings that determine whether users can view idea exchanges, contribute ideas, comment on ideas, change the status of an idea, and manage ideas, comments, and statuses.

Given that idea exchanges are a great way to attract traffic to a community, you will probably want to allow all community members to read and add ideas and comments. Management of ideas, comments, and statuses are typically left in the hands of moderators or community managers.

As a general rule, the easiest way to manage permissions for idea exchanges is to set them at the community level.

- » **Tip** See the Managing Roles and Permissions section of your *Administrator's Guide* for more information about roles, permissions, and how they interact.

To set idea exchange permissions:

- 1 Open the Permissions page.
 - For community-wide settings, choose **Community Options > Community Admin > User Management > Permissions**.
 - For a specific idea exchange, go to the idea exchange page, click the link for **Idea Exchange Admin**, and choose **User Management > Permissions**.
- 2 Click **Edit Roles** and click the **Edit Role** button for the role you want to edit. Or, click **Edit Defaults** to set the default permissions.

These are the permissions that affect idea exchanges.

This permissions	Lets users
Allow user to create ideas	Post ideas to idea exchanges.
Allow user to comment on ideas	Post comments on ideas in idea exchanges.
Allow user to read ideas and their comments	View the ideas and comments posted in idea exchanges.
Allow user to manage ideas	Edit, move, or delete ideas posted to idea exchanges.
Allow user to manage idea comments	Edit, move, or delete comments that have been posted to idea exchanges.
Allow user to change the status of an idea	Change the status of an idea and add a comment about why the status is changing.
Allow user to create or delete ideas statuses	Add, edit, or delete idea statuses.

- 3 Click **Save Permissions**.

Incorporating Ideas activity into user rankings

Just as you can with other community activity, you can weave Ideas into your community's ranking system as a criterion for achieving a new rank. You can, for example, require relatively new community members to vote for a certain number of ideas before they can advance in rank. Or, you might require long-time members to post a certain number of new ideas before they move to the next rank.

- » **Note** In order to include Ideas activity requirements for a rank, you must use a ranking formula (see the *Implementing Ranks in Your Community* section of your *Administrator's Guide* for more information about using ranking formulas).

To incorporate Ideas into user rankings:

- 1 Choose **Community Admin > User Management > User Rankings** and choose the rank you want to edit.
- 2 To add Ideas requirements for a rank, add any of the metrics listed in the Help for the ranking formula.
The format for using these metrics is: `(net_idea_threads>=15)` or `(net_idea_comments>=100)`.
- 3 Click **Save Ranking**.

Viewing Ideas metrics

The Lithium system collects metrics on Ideas activity throughout your community—ideas posted, comments posted, and ideas and comment read.

There are two types of Ideas metrics: per node metrics and user/role metrics.

- Per node metrics are accumulated for a given time period and at a given level in the community (a node). A node can be an individual idea exchange, a category, or the entire community. Category metrics include all idea exchanges in the category. Community metrics include all idea exchanges in the community.

Per node metrics are updated each time Ideas-related activity occurs. The default scope for a per node metric is the entire community, and the default time range is today. You can change the scope to category or idea exchange and you can change the time frame to a specific day, a week, a month, a quarter, or a year. For example, if you run the **Ideas** metric for an idea exchange, you see number of ideas that have been posted to that idea exchange during the selected time frame.

- User/role metrics are accumulated for a given time period across the community for each user and each role. If you choose users as the scope, you can report on an individual user or get a summary for up to 50 users. If you choose roles as the scope, you can choose one role or get a summary of all roles. The default time frame is today and the granularity is daily. You can change the time frame to a specific day, a week, a month, a quarter, or a year, and the granularity to hourly, weekly, or monthly. To continue with the same example, if you run the **Ideas**

metric for an individual, you see the number of ideas that individual has posted during the selected time frame.

To view Ideas metrics:

- 1 Choose **Community Admin > Metrics > Ideas**.
- 2 Click the specific metric you want to view.

These are the Ideas metrics.

This metric	Tells you
Ideas idea_threads	The total number of ideas posted to idea exchanges. This metrics does not include comments.
Ideas Deleted deleted_idea_threads	The number of ideas deleted from idea exchanges.
Net Ideas net_idea_threads	The number of ideas posted to idea exchanges (Ideas), minus the ideas that have been deleted (Ideas Deleted).
Ideas Comments idea_comments	The number of comments added to ideas.
Ideas Comments Deleted deleted_idea_comments	The number of ideas comments that have been deleted.
Net Ideas Comments net_idea_comments	The number of ideas added to idea exchanges (Ideas Comments), minus those that have been deleted (Ideas Comments Deleted).
Comments per Idea comments_per_idea	The average number of comments added to each idea. This is calculated by dividing the total number of comments (Ideas Comments) by the total number of ideas (Ideas).
Net Comments per Idea net_comments_per_idea	The average net number of comments for each idea. This is calculated by dividing the net number of comments (Net Ideas Comments) by the net number of ideas (Net Ideas).
Idea Exchange Feed Views idea_feed_views	The number of times an idea exchange feed (RSS/Atom) has been viewed.
Idea Exchange Views idea_bank_views	The number of times the idea exchange overview page has been viewed. This is equivalent to the overview page for a board.

This metric	Tells you
Ideas Views idea_views	The number of times an Ideas page has been viewed. This metric does not include Ideas comments.
Ideas Page Views idea_page_views	The number of times Ideas-related pages have been viewed. This metric includes Ideas Views and Idea Exchange Views .

