VMware Socialcast

User Guide

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Introduction

VMware® Socialcast is a secure enterprise chat and social platform that connects people to relevant business information. You can collaborate with coworkers, customers, and business partners using an integrated set of productivity tools and applications.

Socialcast is designed specifically for businesses that want to improve the exchange of ideas and information across teams, organizations, and locations. Socialcast connects you to the knowledge, ideas, and resources that you need every day at work.

Connect and Engage

- Chat with a co-worker, customer, or business partner in one-on-one conversations

- Setup a persistent group chat to stay connected with your teams

- Learn about the latest developments by following the relevant people, projects, and groups

- Gain organizational alignment on vision via the built-in town hall meetings

Work Smarter

- Setup project rooms to bring people, information, and ideas together

- Send messages and share files for content collaboration

- Include internal and external contributors of your projects

- Allow teams to vote on ideas using the Challenges feature

- Initiate face-to-face meetings with screen sharing for quicker alignment

- Ask questions or respond as a subject matter expert to spread the knowledge wealth

Celebrate Success

- Send 'Thanks' to people for going above and beyond

- Send out polls to conduct retrospectives and gain valuable insights

- Distributed team members can join a virtual meeting using Google Hangouts integration

Profile

A profile is your identity in the community. It can be seen by all members, and allows others to learn about you and your role in the organization.

Create Profile

A profile is your identity in the community. It displays your personal as well as job related data and can be seen by all members, allowing the members to learn about you and your role in the organization.

On your profile, you can display a photo, job title, job description, certifications, skills, education, passions, email, and other information. Your organization's community Administrator can add additional fields as needed. To edit your profile, such as your name, title, and job description, simply click the pencil icon alongside your name on the Socialcast page.

Hover over the 'Avatar' and click on 'Change photo' to upload a photo from your computer, take a picture with your webcam, or import from your LinkedIn account.

You can also edit your profile using the settings icon ⚙ on the right of the top banner and then select 'Settings' from the drop-down menu to view the Edit Profile page.

Customize Settings

It is not just your profile that you can customize but also other preferences for your Socialcast account. You can change the account settings, decide for what activities on Socialcast you must receive email notifications, change the password of your Socialcast account, or even deactivate your account.

From the settings icon, use the 'Settings' option. This takes you to the Settings page where all of the above mentioned activities can be performed.

Change Account Settings

You can decide the language and time zone that must be displayed on your Socialcast account. On the Account Settings page, select the language and time zone of your choice from the drop-down menus and click **Save**.

Set Notifications Preferences

Your community has an email notification system that can alert you to messages or comments depending on your preferences. You can select the notification settings you most prefer when editing your profile.

On the Settings page, click **Notification Settings** and select the check boxes for activities where you want to receive an email notification. For example, you can ask to receive an email when someone follows you, sends you an @mention, comments on a message, or joins the group. Once you have finished making your selections, click **Save** to save your changes. Notifications are a good idea if you are just getting started in a Socialcast community, or if you are frequently away from your desk. It helps ensure that you don't miss important events or messages.

Change Password

It is a good idea to change your password regularly to protect sensitive company information and conversations. On the Change Password page, enter your new password and confirm the new password, then click **Save**.

Chapter 2:
Working with Streams

Stream

A Stream is a display of real-time updates created by your organization's community, which consists of messages, ideas, and questions posted by you or other members. It can also contain links to external or uploaded videos, photos, and files. Additionally, you can import information from external sources (for example, Twitter and RSS streams) if your community administrator has enabled this feature.

Types of Streams

- **Home Stream** - Your Home Stream contains the activity of people and topics you care about. It shows messages from members and groups you are following, as well as any posts where you have been @mentioned. If you set up RSS feeds from sources like Twitter© or LinkedIn©, they show up in your Home Stream as well. When you first get started in Socialcast, your Home Stream is not very active. Over time, as you follow people and join groups, your Home Stream becomes a centralized, highly efficient source for information, and updates.

- **Company Stream** - The Company Stream displays all public messages from all members in your community, including messages posted to public groups. All members' messages will be posted here, regardless of whether you are following them or not. The Company Stream is useful for discovering interesting people, topics, or groups you may be interested in following.

- **Custom Stream** - You can create a stream of your own to follow particular groups or people of your interest. Messages from these people or activities on these groups appear on your custom stream.

- **Bookmarked Stream**- The Bookmarked Stream displays all public messages that you have flagged for follow-up in the community. These messages also display any comments or likes that other members make to the original post. To bookmark a message, click the bookmark icon in the upper-right corner of the message. When the message no longer needs to be bookmarked, click the 'flag' icon again.

- **Sent Stream** - The Sent Stream displays all the messages that you have sent to the community. This is a good way to scan how users have commented or liked your posted messages.

- **@Mentions Stream** - Any time a coworker specifically references you in a public message with an @ symbol in front of your name, it appears in your @Mentions Stream. @Mentions is a good stream to check out periodically, especially if you have turned off your email notifications. Every mention of you is highlighted, so it is easy to locate and read the messages that concern you.
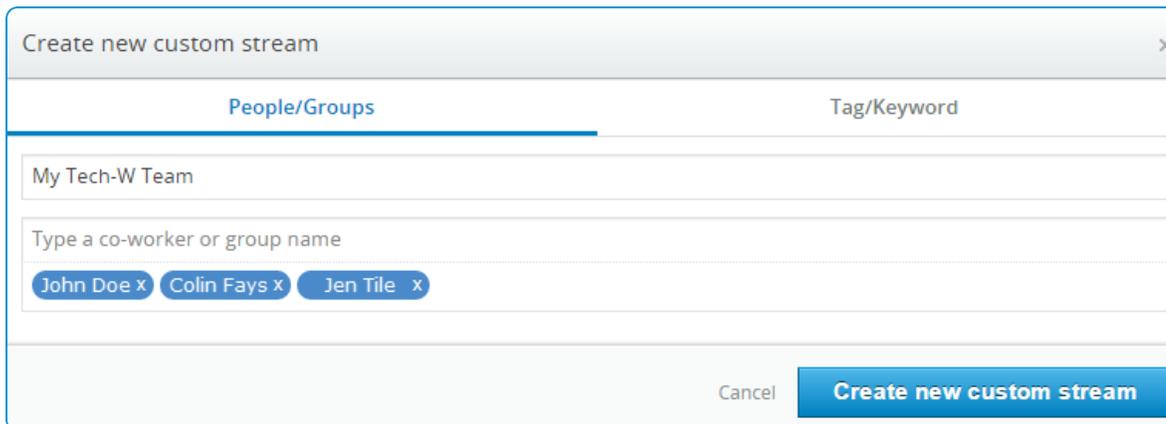
Create Custom Streams

You can create custom streams to follow particular subjects, members, or groups to help organize relevant information.

To create a custom stream:

1. On your Home stream, click the drop-down arrow next to **Home** and then select **+ New Custom Stream**.
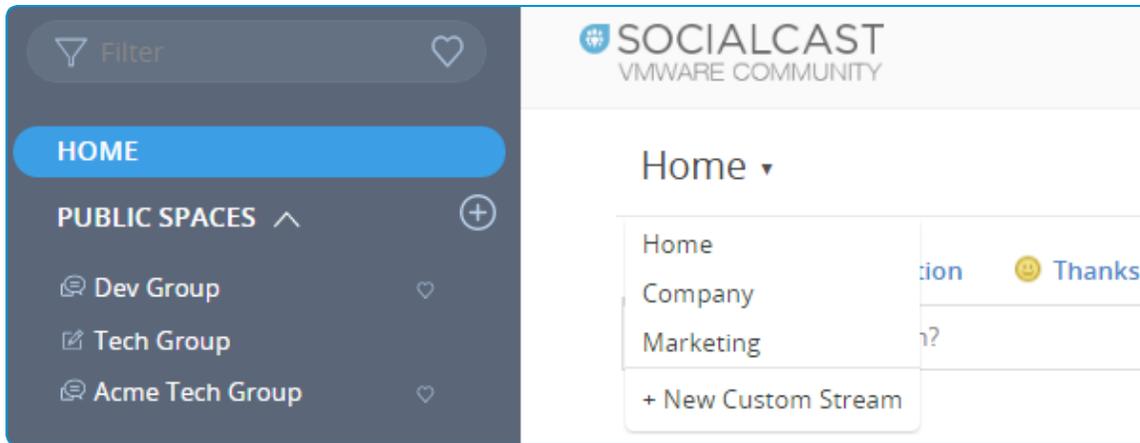
2. In the **Create New Custom Stream** window, enter a title and choose to filter the stream by individuals in your company or by certain tags (keywords). Once created, your custom streams are listed in the **Home** drop-down menu.

Modify or Delete a Custom Stream

You can edit or delete any of your custom streams by clicking the gear icon located to the right of the stream name.

You can also make your custom stream your default stream using the **Make this stream my default** option from the menu. After you set your custom stream as your default stream, choosing 'Home' from the menu does not open the Home stream. To access Home stream, you have to select it from the left navigation panel.

Chapter 3:
Working with Spaces

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Overview

Groups, Projects, Challenges, and Town Halls form the core features of Socialcast. Using these features you can collaborate with other members of your community and organize your business.

You might want to create some of these features newly or join some of the existing ones that might be of your interest. All these features are collectively known as **Spaces** and are categorized as **Public** or **Private.** You can create new spaces or join the existing ones using the add icon ⊕ available next to the public and private spaces.

Groups

Group in Socialcast is a place for you to collaborate with people with a shared interest. Joining a group is a great way to connect with targeted audiences within the community. Groups can be about anything such as departments, functions, or interests. Group members participate in discussions, keep track of the group-related documents, and remain aware of the activities in the group.

Groups can be made either public or private and these groups can be further differentiated based on the communication type selected for the group. The communication types for the groups are Chat and Post.

Communication Types

Chat or Post, the communication types preferred while creating a group, determines the manner in which the conversations take place in a group.

Chat

Chat is best suited for real time, fast-paced, or urgent conversations. This type of communication benefits the group members especially while trouble shooting issues, handling exceptions or for passing some quick urgent information to one another. These conversations appear in a chronological order with the newest message at the bottom.

Post

Post is a communication form that allows members to have asynchronous threaded conversations in a group. Here, the multiple responses to the main post are sorted with the most recent message appearing at the top of the threaded conversation. Post is beneficial for having deep conversations about topics such as strategy discussions, policy changes, product updates and so on.

Create a Group

You can create a group based on your choice of access type, that is, if you want your group to be publicly available or as a private group that is strictly accessible to selected people.

Before creating a group, search the Group Directory to make sure a similar group does not already exist. When searching, use keywords that would best describe your intended group. When in doubt about an existing group's purpose, you can contact the Group Administrator, listed to the right of every group page. If the right group doesn't exist, create one.
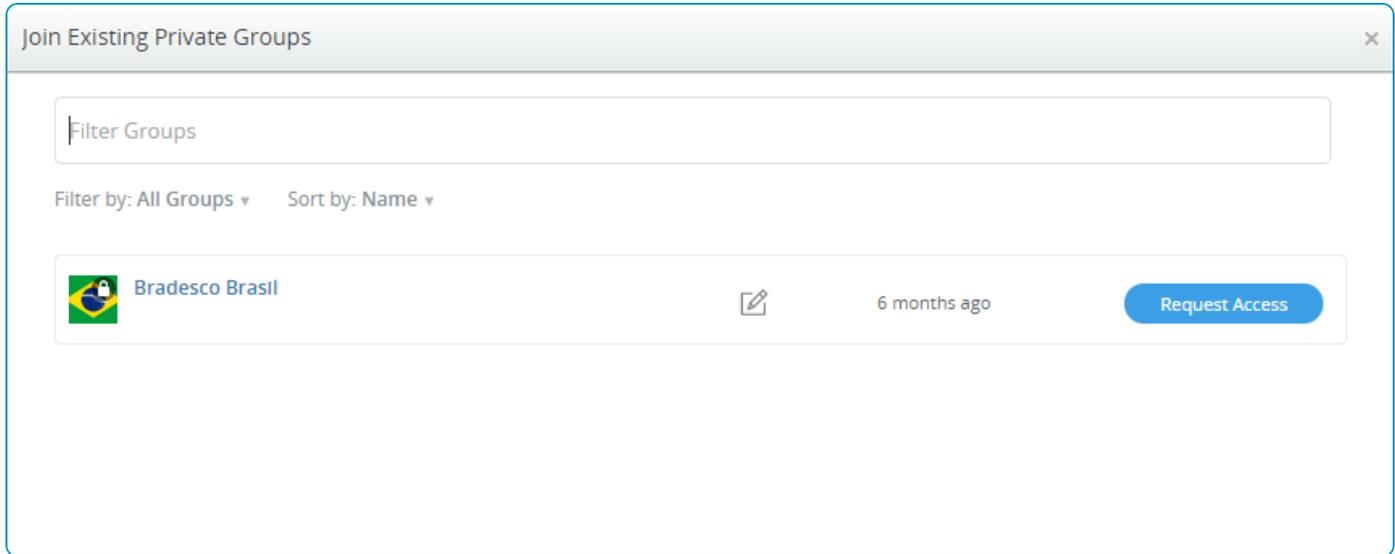
To create a group:

1. Click the add icon ⊕ next to the **Public Spaces** or **Private Spaces** on the left navigational panel to create a public group or a private group respectively. For example, if you click the add icon next to Private Spaces, the **Create Private Group** window displays.
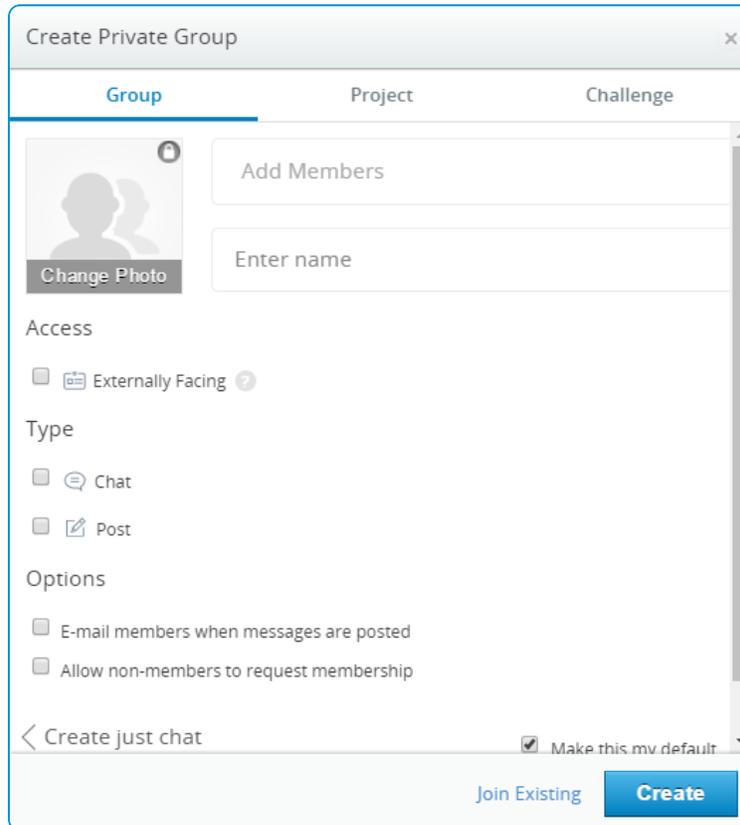
2. Add members and enter a group name. You can also add an image to represent the group.

3. Select the **Externally Facing** check box if you wish to invite non-community members to participate in the group. This option is not seen while creating a public group.

4. Select the type of communication for your group: **Chat** or **Post**. You can have both chat and post for your group.

5. Select the required **Options**:

   - Select the **E-mail members when messages are posted** check box if you want your group members to receive emails when new messages are posted to the group.

   - While creating a private group, if you want non-members to request for membership, then select the **Allow non-members to request membership** check box.

   - While creating a public group, you can see the **Exclude from Company Stream** option. Select this option to block the group's post from entering the Company Stream. Use this feature when your group is not of interest to a large portion of the company (for example a special interest group, or a group specific to one office location).

6. Select **Make this my default** check box if you want to make the group as your default page that appears every time you login to Socialcast.

7. Select **Create** once you have set all the required information.

If you want to quickly create a chat group without configuring the above options, then select the **Create just chat**. Here, all you have to do is add members and enter a name for the group.

Also, if you want to join any existing groups, then select the **Join Existing** link to view the already created groups and request access or join directly depending on whether you are creating a private or a public group.


Manage Your Group

After you create a group, you can use the various features on your group page to effectively manage your group members and activities. From the group page, you can edit the group settings whenever required, add more members, and make the group stream your default stream.

Expand and Collapse View

The basic details of your group such as the group description, settings icon, button names, and member details are always in the collapsed view by default.
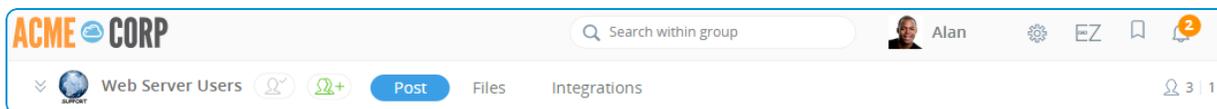
When you click the expand icon ⌄ next to the group avatar, the group details appear in the expanded view. The details includes the settings icon, group description, tabs, and member details.
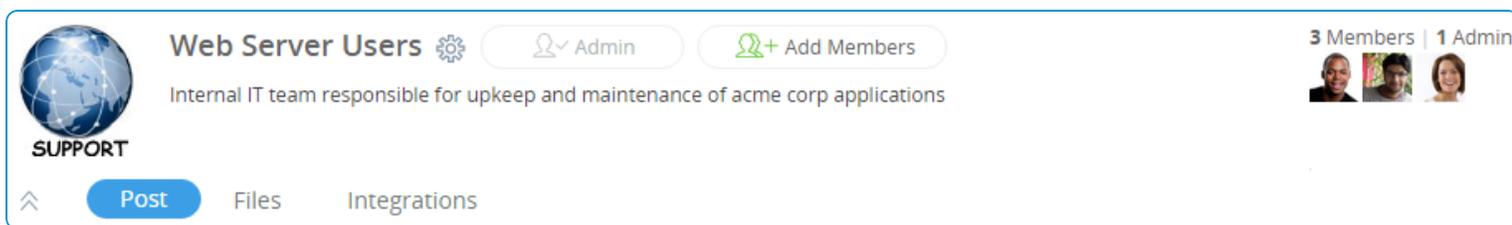
Post

You can view all the messages that have been posted to your group.

Files

You can view all the attachment files that have been shared in your group. Select the icon ⚙ located next to an image to download the image or view the related post.

Integrations

You can view the apps that have been enabled for your group. Only the Group admin can add the required apps to a group. You can view or attach files through Box or VMware® AirWatch® Content Locker only if the community admin has enabled these apps at the community level.

Settings

The settings icon ⚙ next to the group name shows few options exclusively for the group admins. If you are the admin of your group, you can see the following options. These are not available for the other participants of the group.

- **Edit Settings** - Make changes to your group settings whenever required.

- **Manage Members** - Un-follow any of your group member, make a group member the group admin, or remove a group member from the group. You can also resend or cancel an invitation to a member.

- **Edit Helpful Links** - Add links to your group resources and other helpful links using **Edit Helpful Links**. The added links appear under **Group Helpful Links** to the right of the group page.

- **Archive** -Temporarily deactivate your group after which you can also delete your group.

Add Members and Invite Requests

You can add your group members while creating the group, or even later . The **Add Members** icon enables you to send an email invite to a member to join your group. And once you send the email invites, the **Invite Requests** icon appears notifying you of the number of requests sent.

Archive or Delete a Group

After your group has served its purpose, you can either archive it or permanently delete it. Archiving temporarily deactivates your group and you or the other group members cannot post new messages to this group. However, an archived group can be reactivated at any time.

To archive or delete a group:

1. Click on the expand icon ⌄ next to the group name on the group page. This reveals the settings icon.

2. Click on the settings icon ⚙ and select **Archive** from the menu. Now, the group is archived.

3. If you want to permanently delete the group, click the settings icon once again and select **Delete**.

Projects

Using the Projects feature, anyone can create and manage projects in the community. A project is similar to a group, but with the added structure of objectives and tasks. A project can be public or private, and has a set of members who participate in project activities and receive project notifications. Like a group, each project has a stream where team members can communicate about the project, ensuring that people stay in touch and the project as a whole is on track.
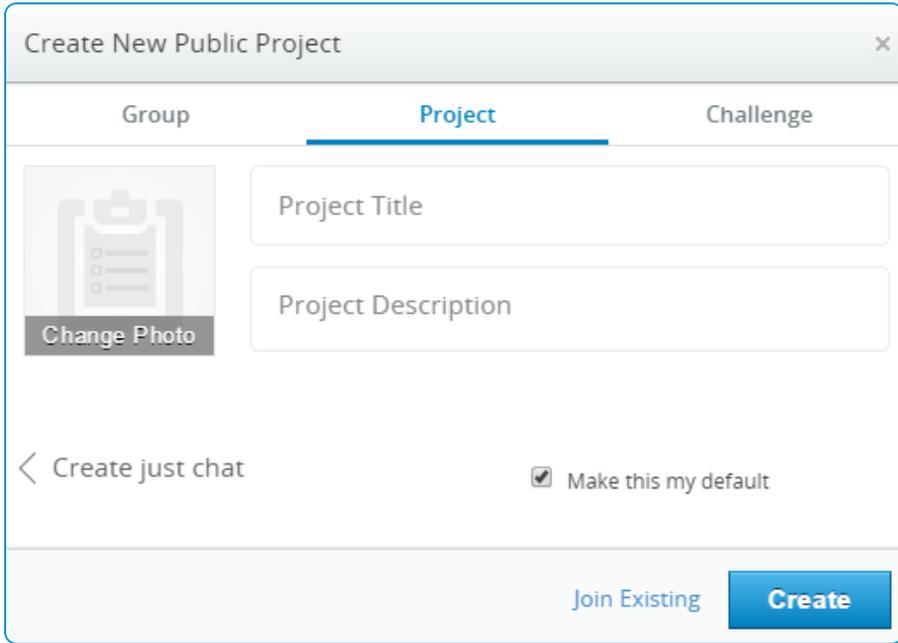
Create a Project

You can create either a public or a private project. Once you create a project, you can add objectives to it and also set a due date for completion of those objectives.

Before creating a project, it is recommended to search the Project Directory to ensure a similar project does not exist. When searching, use keywords that best describe your intended project. When in doubt about an existing project's purpose, you can contact the Project Lead, listed to the right of every project page.

To create a project:

1. Click the add icon ⊕ next to the **Public Spaces** or **Private Spaces** on the left navigational panel to create a public project or a private project respectively. For example, if you click the add icon next to Public Spaces, the **Create New Public Project** window displays.

2. Select the **Project** tab.

3. Enter the title and the description for the project.

4. Select **Make this my default** check box if you want to make the project as your default project that appears every time you login to Socialcast.

5. Select **Create**.

Optionally, if you want to quickly create a project that just enables you to chat with the members, then select the **Create just chat** check box. Here, all you have to do is add members and enter a name for the project. Also, if you want to join any existing groups, then select the **Join Existing** link to view the already created groups and request access or join directly depending on whether you are creating a private or a public project.

Create an Objective

A project can have multiple objectives, which serve as milestones. Each objective has its own due date and set of tasks assigned to it.

To create an objective for your project:

1. Click **Add Objective** and enter your objective in the box that appears.

2. Click on the calendar icon to the right of the objective name and select an appropriate due date.

Challenges

Challenge is a space where you can put forth a task and ask people to submit their ideas for the accomplishment of the task. For example, you have a product that requires improvement. You can create a challenge asking people what features they would like to see in the product.

You can describe the goals, rules, or guidelines while creating challenges to guide people in submitting their ideas. You can also show your support for an idea by voting for it.
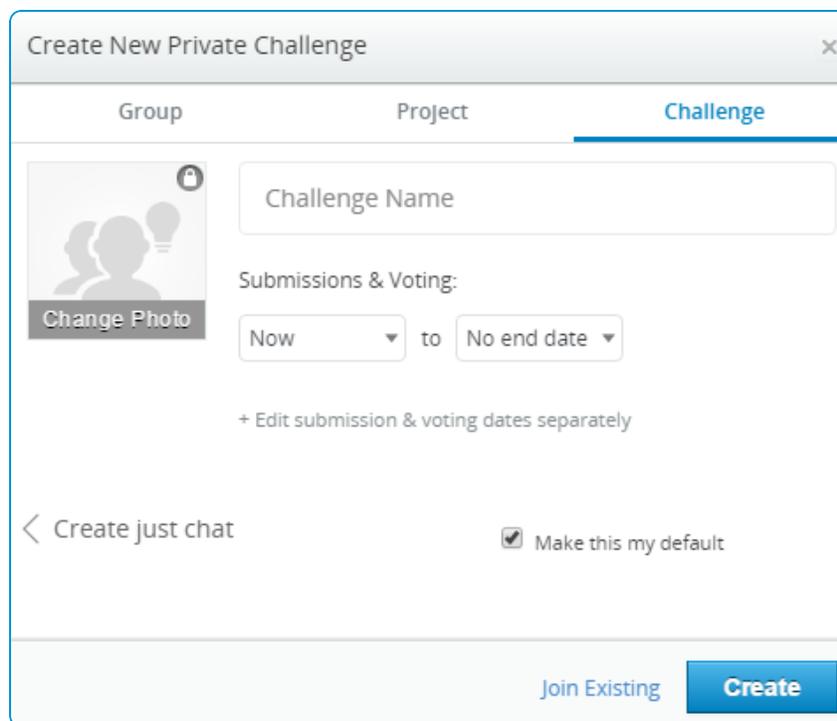
Create a Challenge

Similar to Groups and Projects, you can create challenges either as public or private. While creating a challenge, you can set the time period allowed for submission and voting of ideas. You can setup a challenge not only for a group but the whole community as well.

Prior to creating a challenge, search the Challenges directory to ensure a similar challenge does not exist. When searching, use keywords that best describe your intended challenge. When in doubt about an existing challenge's purpose, you can contact the moderator of the challenge, listed to the right of every challenge page.

To create a challenge:

1. Click the add icon ⊕ next to the **Public Spaces** or **Private Spaces** on the left navigational panel to create a public challenge or a private challenge respectively. For example, if you click the add icon next to Private Spaces, then **Create New Private Challenge** window displays.

2. Select the **Challenge** tab.

3. Enter the challenge name and the set the dates for submission and voting of ideas. You can set dates for voting separately if it differs from the submission time period.

If you want to quickly create a chat group to chat with the members, then select **Create just chat** . Here, all you have to do is add members and enter a name for the project. Also, if you want to join any existing challenges, then select the **Join Existing** link to view the already created challenges and request access or join directly depending on whether you are creating a private or a public challenge.
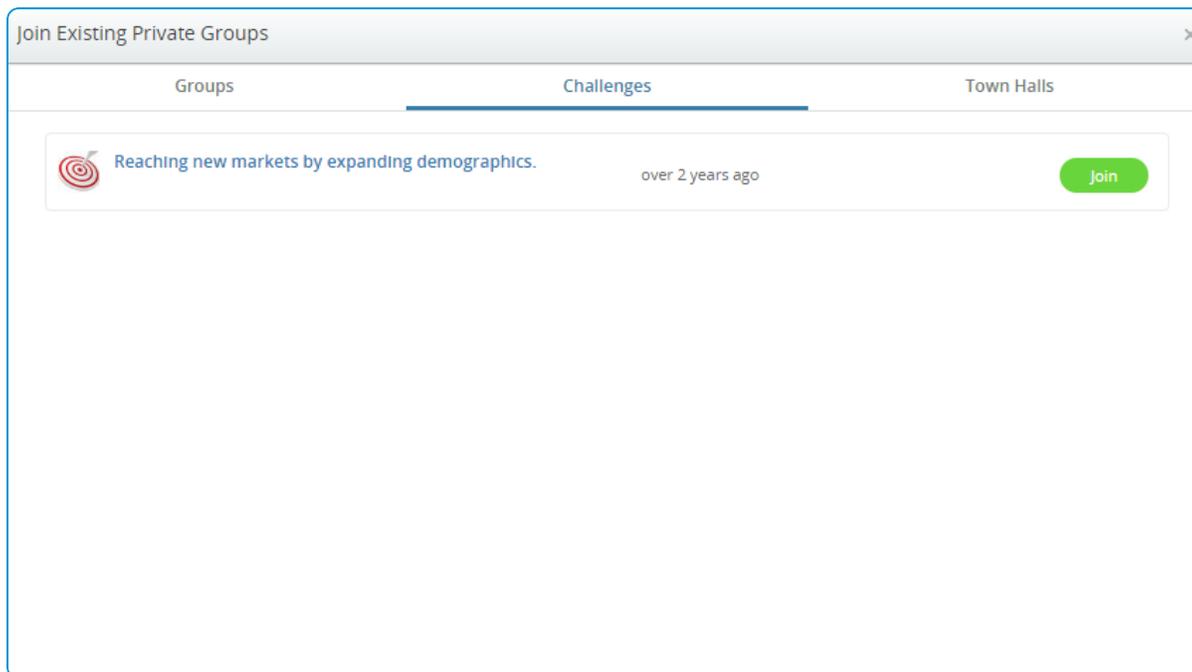
Town Halls

You can create Town Halls if you are a Town Hall admin and wish to hold interactive discussions or meetings with the community members. The Town halls can be made public or private. You can easily set up a Town Hall in Socialcast.

Create a Town Hall

If you are a Town Hall admin, you can either create a public or private Town Hall . Other users can only view and join any of the available Town Halls upon invitation.

To create a Town Hall:

1. Click the add icon ⊕ next to the **Public Spaces** or **Private Spaces** to create a public or a private Town Hall respectively. For example, if you click the add icon next to Public Spaces, then **Create New Public Town Hall** window displays.

2. Select the **Town Hall** tab.

3. Enter the town hall name and the description.

4. Set the **Start Date**, **Start Time**, and **Duration**.

5. Add the Speaker or Moderator for the Town Hall and select **Create**.

Favorite a Space

As you are creating or following more spaces, you may wish to quickly access your frequently visited spaces .You can now set any of your spaces as favorite from the left navigation panel.

To favorite or unfavorite a space:

1. Hover your cursor over any of the space names on the left navigation panel to make the heart icon visible.

2. Click the heart icon . The heart icon turns red indicating the space has been favorited.

3. Click the heart icon once again to unfavorite the space.

> **Note**: Town Halls cannot be favorited.

Once you have favorited your spaces, you can quickly view all your favorited ones by using the favorites filter on top of the left navigation panel. If you click the heart icon in the filter box, only your favorited spaces appear on the left navigation panel. This filter works as a text filter too, where you can enter the name of your space to quickly search and access it. You can also use text filter in conjunction with your favorites filter to quickly find a specific favorited space.

Chapter 4:

1-1 Chats

Overview

Chat enables you to communicate in real time with people in a group or with a single person. Depending on the need and the nature of the conversation, you can decide if you want a group chat or a 1-1 chat.

1-1 Chats

Using 1-1 chats, you can converse privately with a single person. When you converse with a single person, private messages take on the character of instant messaging, often with a flurry of brief messages exchanged during a period of a few minutes. All your 1-1 chats show a lock symbol over the conversation avatar indicating its private nature. You can also add attachments to your chat.

Start a 1-1 Chat

In order to start a 1-1 chat with a person, at first, you need to search for the person in the 1-1 chat search window. Once you spot the person, type a message in the chat window and post a message to begin a conversation.

To start a 1-1 chat:

1. Click on the add icon ⊕ next to **1-1 chats** on the left navigational panel.
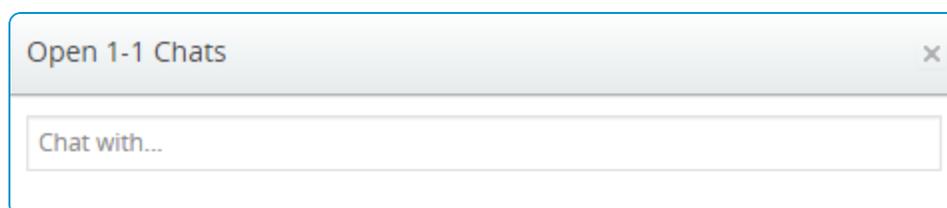
2. In the **Open 1-1 Chats** window, enter the name of the person with whom you want to chat.

3. Select the name of the person from the search list.

4. In the chat window, enter your message in the message field and click **Post** to send the message. You can also send a message by pressing Enter once you have enabled the **Press Enter to Send** check box.

To start a group chat, you have to create a group under public or private spaces.

Chapter 5:
Using Socialcast

Follow People and Conversations

When you follow a person, you are subscribing to their updates, which then appears in your Home Stream. To start following people, click on the gear icon ⚙️ next to your name on the top banner and select **Explore** from the menu. Select **People** on the page that appears.

The list of the people on the Socialcast community appears and here you can navigate to the person you wish to follow, and then click the **Follow** button. You can also follow people whose posts appear in your Company Stream. Simply hover on their name next to their posts or comments, you will get a quick glimpse of who that person is and click **Follow**. It will take you to their profile page. You can also choose to **Unfollow** people using the same process. If someone you follow, posts to a public or private group that you are not a member of , then you cannot see the posted messages in your home stream.

> **Note:** If you choose to unfollow someone, they will not receive a notification.

You can also follow specific conversations, so that all future comments and replies in this conversation appears in your Home Stream. Start by scanning the Company Stream for topics that are relevant to you. Click on the gear icon to the right of a specific message, then click **Follow message replies**. To stop following messages, click the gear icon again, and select **Stop following replies**.

Share with Community

Sharing is the primary way to initiate a conversation within your community. At the top of every stream page, you can find a window that enables you to share an update or an idea, ask a question, send thanks to people, share a document or link, or publicly acknowledge others in the organization. Whatever you share in VMware Socialcast is easily captured and searchable by others, either in the whole company or just in your designated groups, depending upon your preferences. Each message or comment that you author can have files, photos, videos or other files attached to it. Your community supports most file types for image, document, and photo files.

Share with Everyone

When you share from your Home Stream page, your updates are posted to the Company Stream and also to the people who follow you.

Share with a Group

You can also share an update with a specific group. When you share from the group's Home Page, your message appears in both the group and in the Home Streams of people following that group.

You can also share with a group directly from any activity stream. Type your message in the Share box, then type the name of the group in the **People or Groups to notify** section right below your message. As you start typing the group name, the group name appears in the search list. Once you select the group name from the list it is @mentioned in the body of the message. Use the **Post** button to share with the selected group.

Share Privately

From your group page, you can communicate privately in response to a particular group member's post by using the

Reply with chat option. This is available from the settings ⚙ menu that appears when you hover your cursor over the group member's avatar or name. When you select this option, a window appears where you can enter your message. Enter your message and then click **Create**. This opens a private chat window between you and your group member.

You can also use the 1-1 Chats feature on the left navigation panel to start a private conversation.

Know the Icons

The Socialcast user interface shows various icons that represent specific features and functionalities. These icons help you to quickly recognize the functionality and navigate to it.

Top Banner Icons

The top banner icons alerts you of unread messages for the activities on your spaces, navigates you to your bookmarked items, allows you to edit few settings, explore the spaces in your community, and so on.

Icons	Description
⚙	The gear icon or the settings icon allows you to navigate to the **Settings**, **Apps**, and the **Explore** page. It also helps you to navigate to the Community Manager's profile page through **Contact Community Manager**.
EZ	The EZ icon allows you to send an email to yourself containing the EZ link. You can open this email on your mobile device and use the link to access Socialcast mobile app.
🔖	The flag icon displays your bookmarked stream where your bookmarked items appear.
🔔 10	The bell icon with a notification counter shows the number of unread messages for the activities on your spaces.

Left Navigation Panel Icons

The icons on your left navigation panel allows you to add, filter, and favorite your spaces. There are also few symbols seen alongside the space names that helps you distinguish between the spaces.

Icons	Description
⊕	Allows you to create a new space or join an existing space.
⌄ ⌃	Allows you to expand and collapse the spaces.
♡	Allows you to favorite your spaces except Town Halls.
•••	Allows you to clear all the beacons for your spaces.
💬	Indicates the group that you created allows to only chat in the group.
✎	Indicates the group that you created allows to only post the messages in the group.
🆔	Indicates the group that you created is an externally facing group that includes non-community members as participants.
💬	Indicates both chat and post are allowed in the group.
📋	Indicates a project that you created.
💡	Indicates a challenge that you created.
•	Indicates that there are new activities on your spaces.

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	Indicates new chat activity on the public or private chat groups.
	Indicates the number of times you have been @mentioned in the public or private chat groups. If this orange bubble notification counter appears next to 1-1 chats, it indicates the number of unread chat messages

Group Page Icons

On your group's home page, there are few icons that helps you to view the group details in the expanded and collapsed form, add members, and leave the group whenever desired.

Icons	Description
	The expand icon next to your group's name reveals the group description, the gear or the settings icon, the button names, and the group member details.
	The collapsed icon appears when the group details are expanded. Use it to hide the group's details.
	The Add Members icon allows you to add new members to your group. The icon appears without its name when the group details are collapsed. The icon appears with its name when the group details are expanded.
	The leave group icon allows you to leave a group. This icon does not appear on your group page if you are the group admin. The icon appears without its name when the group details are collapsed. The icon appears with its name when the group details are expanded.