THE HIVE



The HiVE Digital Engagement Platform

Quick Start Guide (April 2019)

What is The HiVE?

The HiVE is a complete participation and website building software. For your community, it is your public engagement platform - a website where they can learn more about government plans and policy, participate in community engagement projects and feed into government processes. For you as a user, it is a powerful piece of software that allows you to create attractive and engaging projects and web pages, facilitate public participation, build online communities, manage memberships, and analyse and report on the data you collect.

The HiVE has an extensive toolset of content and participation tools. Content tools allow you to communicate information in visually engaging and interesting ways. These tools allow you to inform and educate your community on your project. Participation tools are used for involving the public in the conversation, ranging from surveys to visual and spatial stories, and user-led conversations. Combined with its easy-to-use interface, The HiVE's toolset gives you the flexibility to get creative, tell meaningful and engaging stories, and gather rich, actionable data to inform good decision-making and grow the relationship between you and your community.

Before you start

We recommend first visiting The HiVE demo site at www.demo.the-hive.com.au to familiarise yourself with the available content and participation tools. Here you can see examples of how the tools work, which will help you get an understanding of what's possible.

The demo site also provides examples of project designs, which can assist you to think about how you will communicate and lay out your content, and the types of feedback you might want to collect from your audience during the engagement.

The most important factor to successfully engaging your audience online is planning, and we recommend first developing an engagement plan to guide you when building your engagement site on the platform. At a minimum, this should include:

- Consideration of the types of content you will add to your site. Gather all the files and images you need, and make sure you have optimised all images for the web (ensure image files are resized so they load easily on slower connections or mobile devices).

- Determining what feedback to collect and how to use it. Review the questions you want to explore with your users, review the pros and cons of each feedback tool, and get an understanding of what data will be collected, how you will analyse it and how you will respond.
- Assessing the potential risks of the engagement and plan for prevention and mitigation. Online engagement carries certain risks so it is important to understand and plan for these at the start.
- Consider future stages of engagement and how these will tie into your previous activities.

User roles

There are three user roles that people that people will be assigned to in THE HiVE.

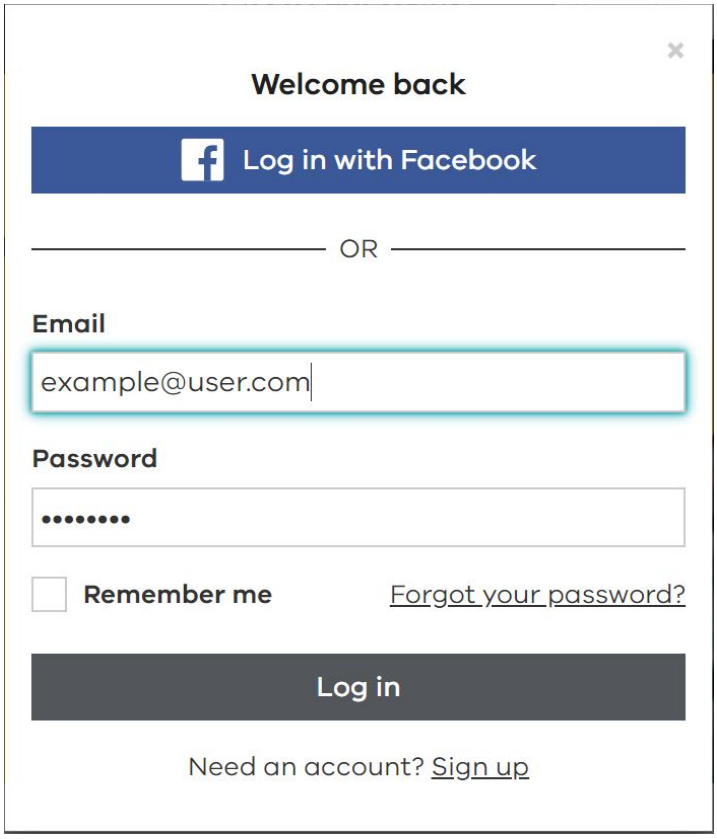
- **Project Manager** – can add/edit content, view results and publish live changes within their assigned project. Project Managers do not have the ability to create new projects or add members
- **Project Author** - can only add/edit content and view results within their assigned project. They must submit changes to the Project Manager or Site Admin for approval.
- **Site Admin** – all of the above as well as the ability to add new users, launch projects and publish content.

Either a Site Admin or Harvest will provide you your username and password to log into the site. If you have not received your log-in details, please contact your Site Admin or, if you are a new customer, send an email to support@harvestdp.com.

Log in

To log in to The HiVE, users must first have a password supplied by the Site Administrator (or by Harvest when the site is set up). There are several ways to sign in to the platform (depending on your site):

- The **Log in/Join** button in the site's main navigation
- The **Log in to site** link in the footer area of the site.
- The login page located at your site's url/login (e.g. yoursiteurl.com/login).



Users must enter their email address and password and then select the **Log in** button. Once successfully logged in, users will see a blue **toolbar** at the top of the site.

After logging in, a new **user session** will begin and will remain active as long as a user remains active on a site. After two hours of inactivity, the 'user session' will automatically end and the user will be logged out of the platform.

User Interface

Toolbar

The Toolbar is the key **User Interface (UI)** component of The HiVE, and provides access to its key functions. In general, functions on the left-hand side of the Toolbar relate to the page the user is currently on, while functions on the right-hand side relate to the site as a whole.

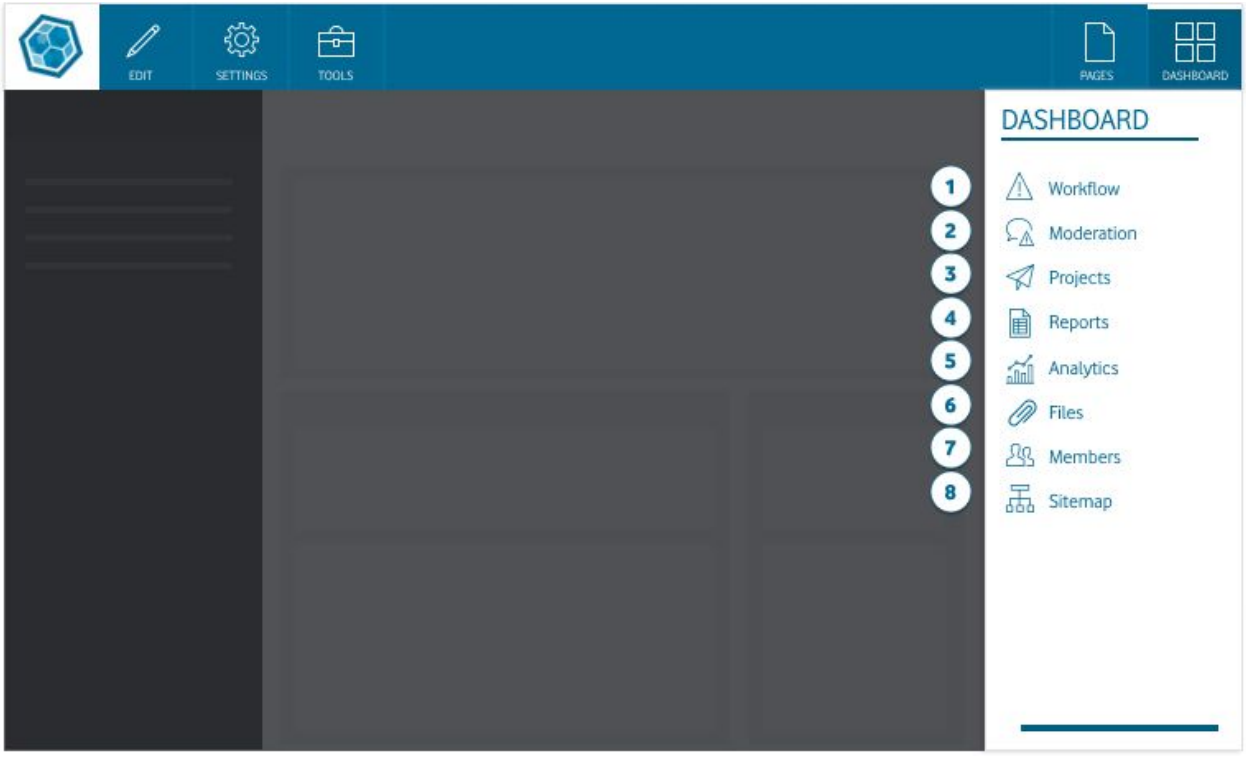


The Toolbar's functions are:

1. **Edit** - Toggles the page in and out of **Edit mode** to enable content changes to be made. This function turns from **Edit** to **Save** when content changes have been made allowing allowing the user to save, publish or discard their changes.
2. **Settings** - Opens the Settings panel containing a number of page details and configurations that can be managed by the user including page attributes, page templates, page versions, SEO meta-data, and a **delete page** action.
3. **Tools** - Opens the Tools panel which contains a wide variety of content and participation tools that can be added to the page.
4. **Update** - Adds a news update to a Newsfeed tool on a project page. This function only appears when a user is on a project page.
5. **Pages** - Opens the Pages panel to where new pages can be added to a project or site, a sitemap of all pages can be viewed, and any 'draft' pages created by the user can be seen.
6. **Dashboard** - Opens the Dashboard panel which provides a number of links to various functionality relating to management of projects, approvals workflows, contribution moderation, management of files, access to reports and data and including management of projects, approvals workflows, moderation of content, management of files, and general settings for the site.

The Dashboard

The Dashboard is the administrative back-end of the platform, and contains a number of functions relating to a site's users, projects, data and settings. The Dashboard panel can be accessed by selecting the Dashboard function located at the top-right side of the toolbar.



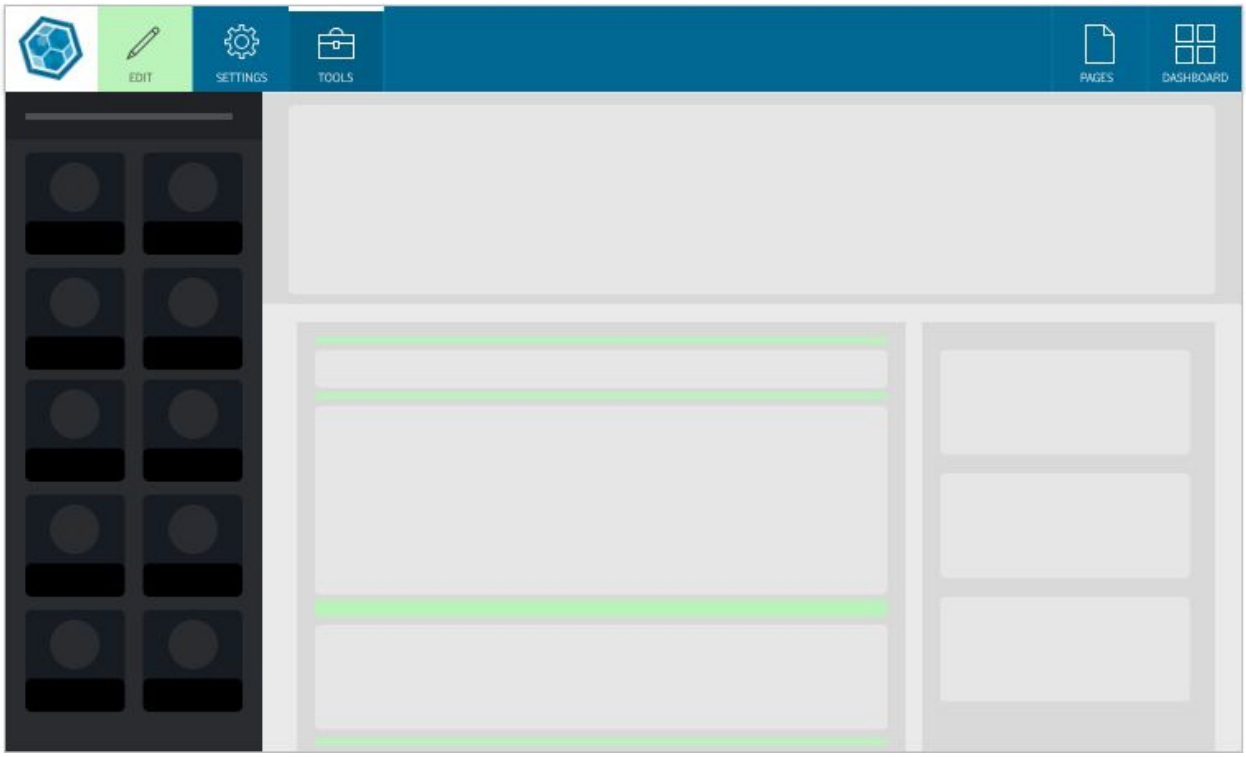
1. **Workflow*** - Links to the Workflow area which displays a list of approval workflows comprised of proposed content changes submitted by content authors ('submitters') to the nominated content approvers ('approvers'). Approvers can view the proposed changes in this area and approve and reject them as required.
2. **Moderation** - Links to the Moderation area which displays a list of all moderation activity on a site and allows users to action key moderation functions.
3. **Projects** - Links to Projects area which displays a list of all projects and associated information and project settings. New projects can also be created from this area.
4. **Reports** - Links to the Reports area allowing users to view a range of reports and access feedback data.
5. **Analytics** - Links to a page showing key analytics and information about the use and performance of a site.

6. **Files** - Links to the File Manager, where you can find, upload, replace, edit and see key information about your files (including images, PDFs, documents and data files).
7. **Members** - Links to the Members area which displays a list of all users of a site including all members and users. Users can also be managed from this area.
8. **Sitemap** - Links to a page with a 'sitemap view' which shows a nested hierarchy of all pages on the site and allows the reordering of pages. Draft pages can also be accessed from this view.
9. **HiVE Settings** - Links to the settings page where a number of configurations can be made to The HiVE.

*May not be available to all customers

Project canvas

The **project canvas** refers to the area located located below the toolbar and becomes activated when a page is put into edit mode. When active, **content areas** appear on the page and are indicated by a thin green outline. These areas indicate where content or participation tools can be added.

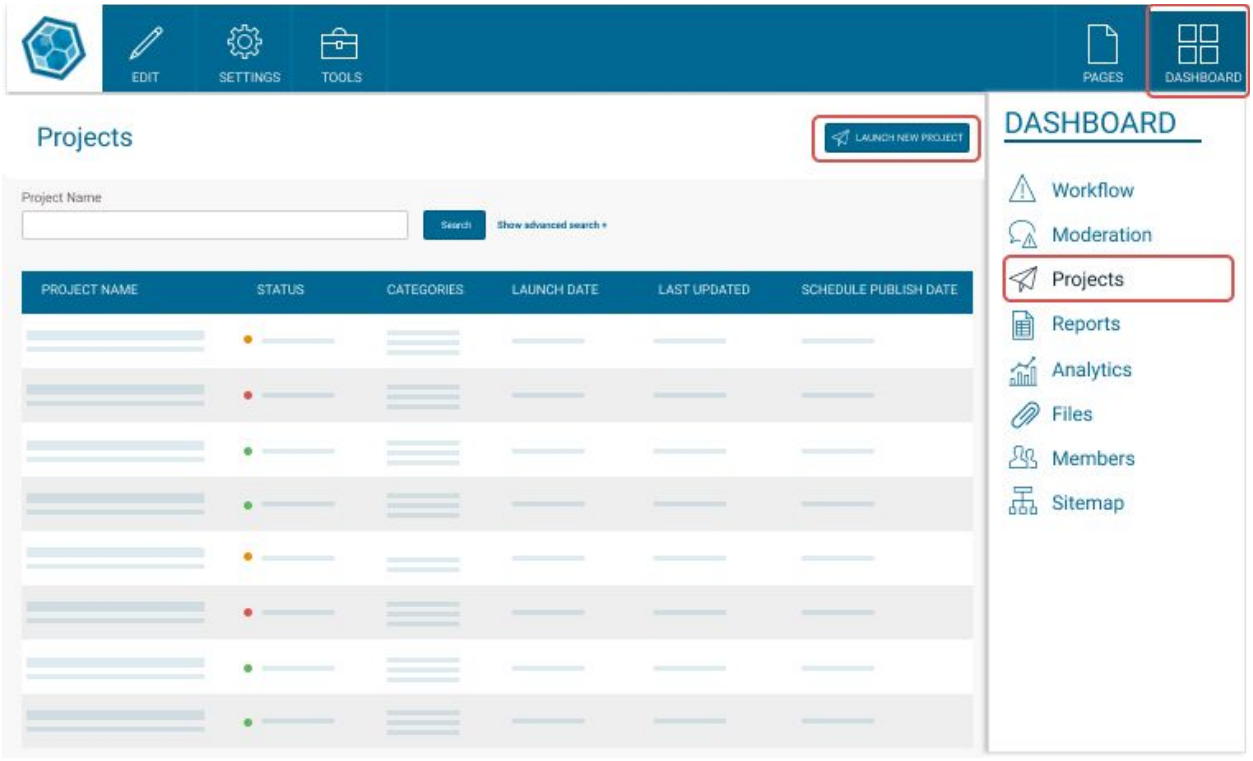


The number and position of the content areas will vary depending on the page template that is used.

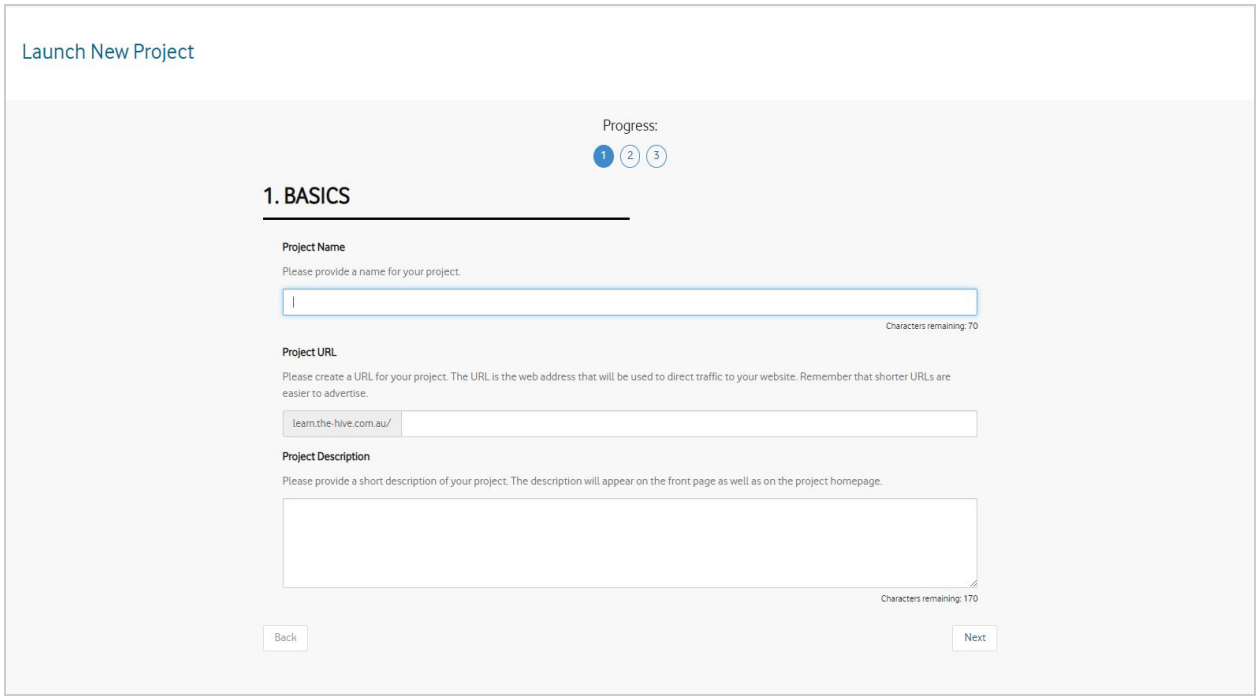
Launching a new project

Note that only Site Admins can launch new projects.

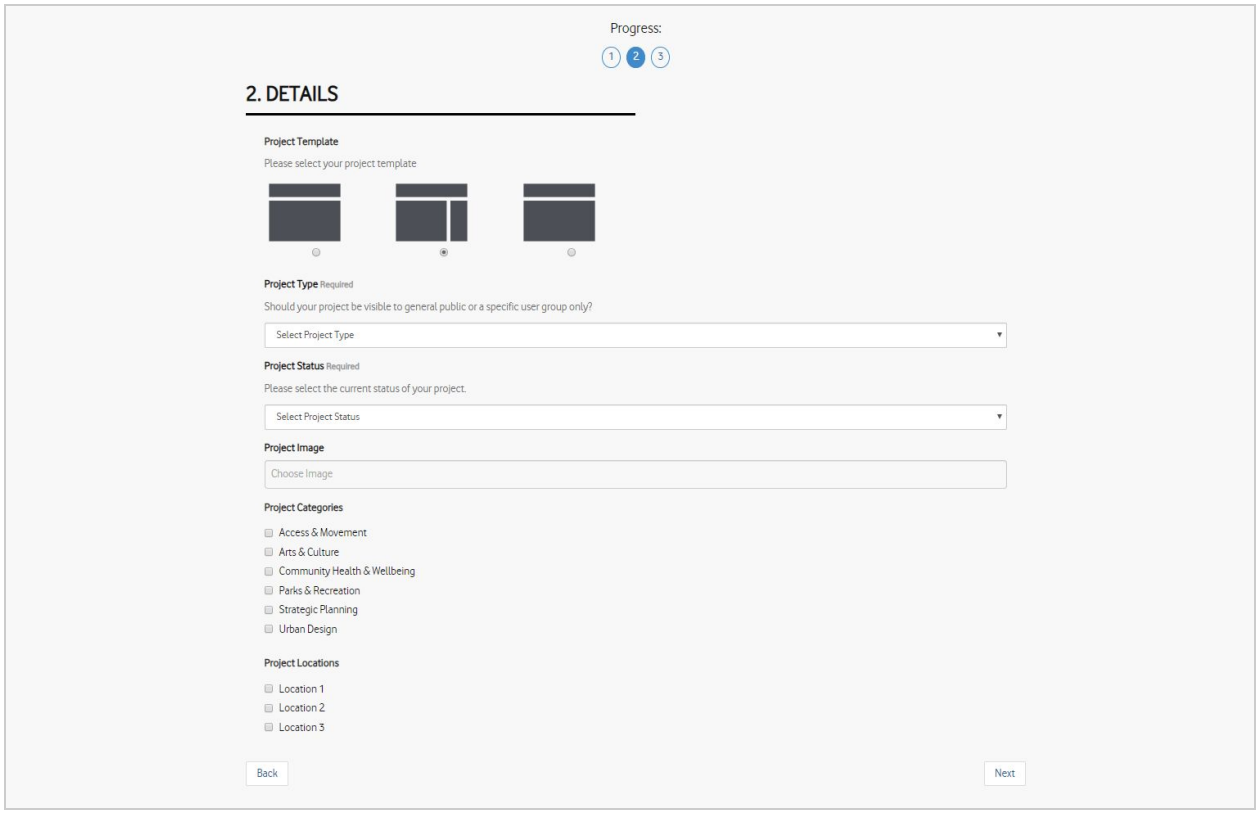
1. Navigate to the **Projects** section of the Dashboard.
2. Select the **Launch a Project** button on the top-right of the page. Fill out the three sections with details of the project (project name, URL, etc.) and then click the **Launch Project** button.



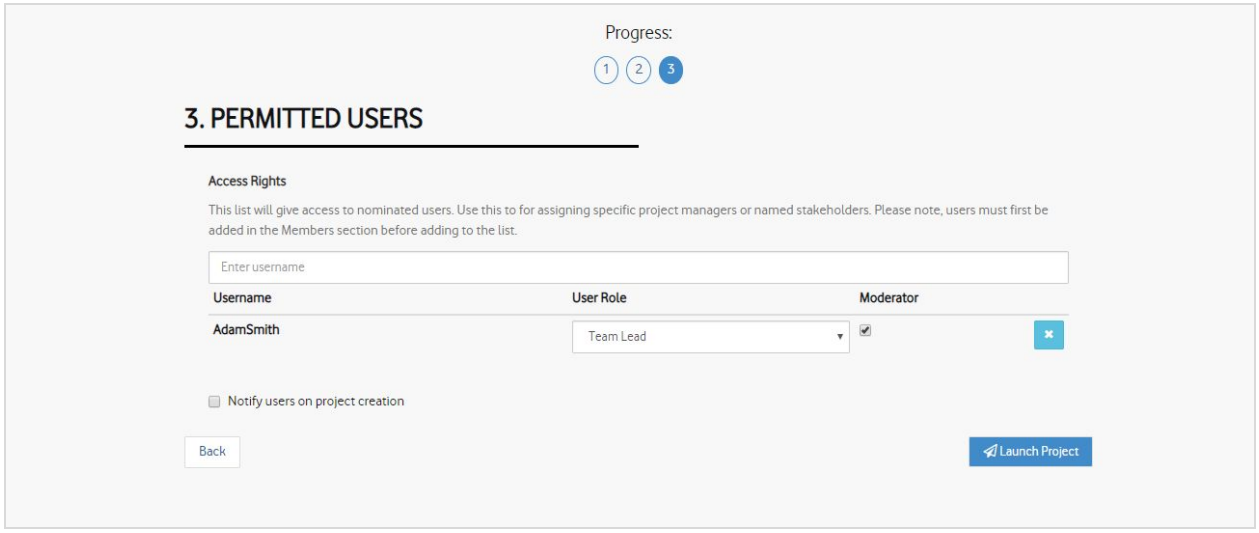
3. You will be asked to provide a **Project Name**, **URL** (this will auto-fill from the project name, but you can provide a custom URL if you wish) and **description** (this will appear on the project card on your home and/or projects page). When you have filled these fields, select **Nex**



4. You will be asked to select a **project template** (this defines the layout of your project page), **project type** (public or private - this defines whether your project is visible to the public), **project status** (open, active or closed), **project image** (this will appear on the project card and in the banner (ensure it is sized optimally for the web), **categories** and **locations**. Note that community members who have selected these categories and locations as interests will receive a notification when the project is launched. When complete, select **Nex**



5. On the final page you will be presented with the option of adding **Site Users** to the project, assigning them **user roles** (ie. Project Manager, Project Author) and notifying them that the project has been created and of their user role. When complete, select **Launch Project**.



6. Once you have launched your project, it will take you to the draft project page where you can start editing and adding content

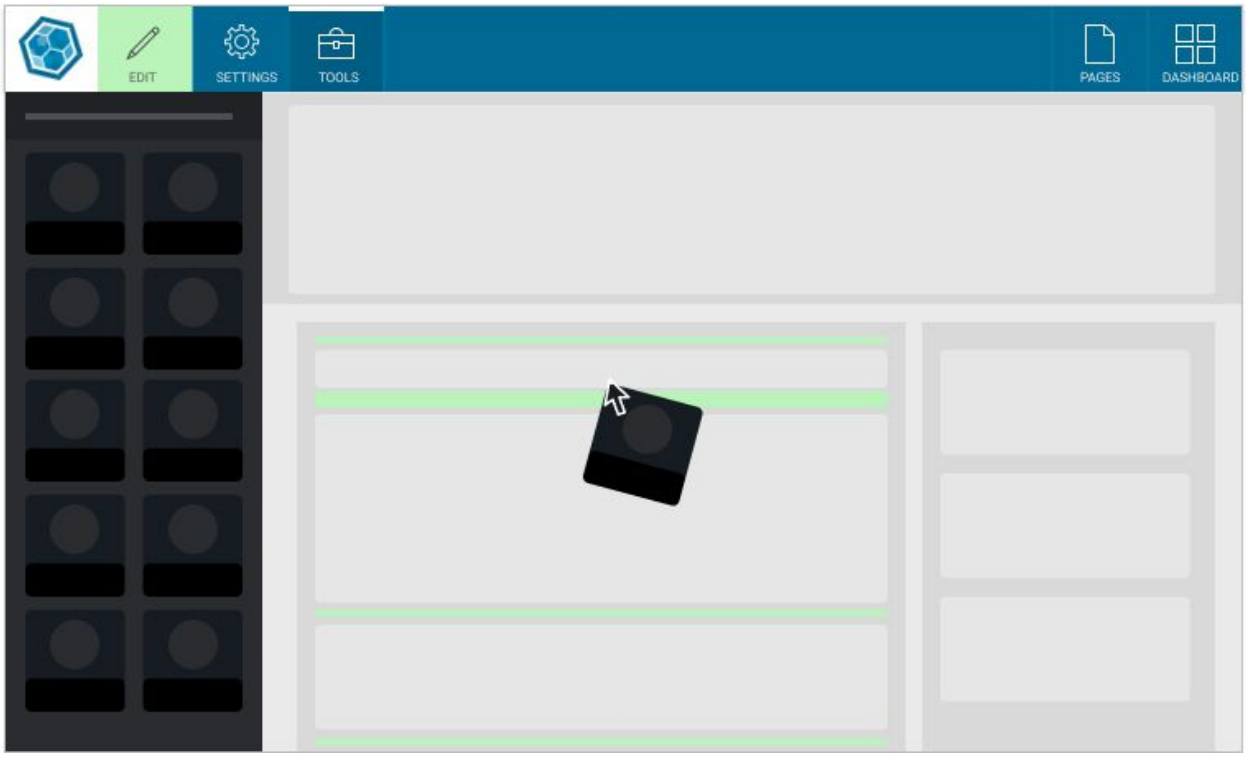
Adding and managing content

To add or edit content to any page, you must first put the page into **edit mode**. To do this, select the **Edit** button at the top left of the screen. The Edit button will turn green and all existing content areas will now have a thin green outline around them.

Adding content

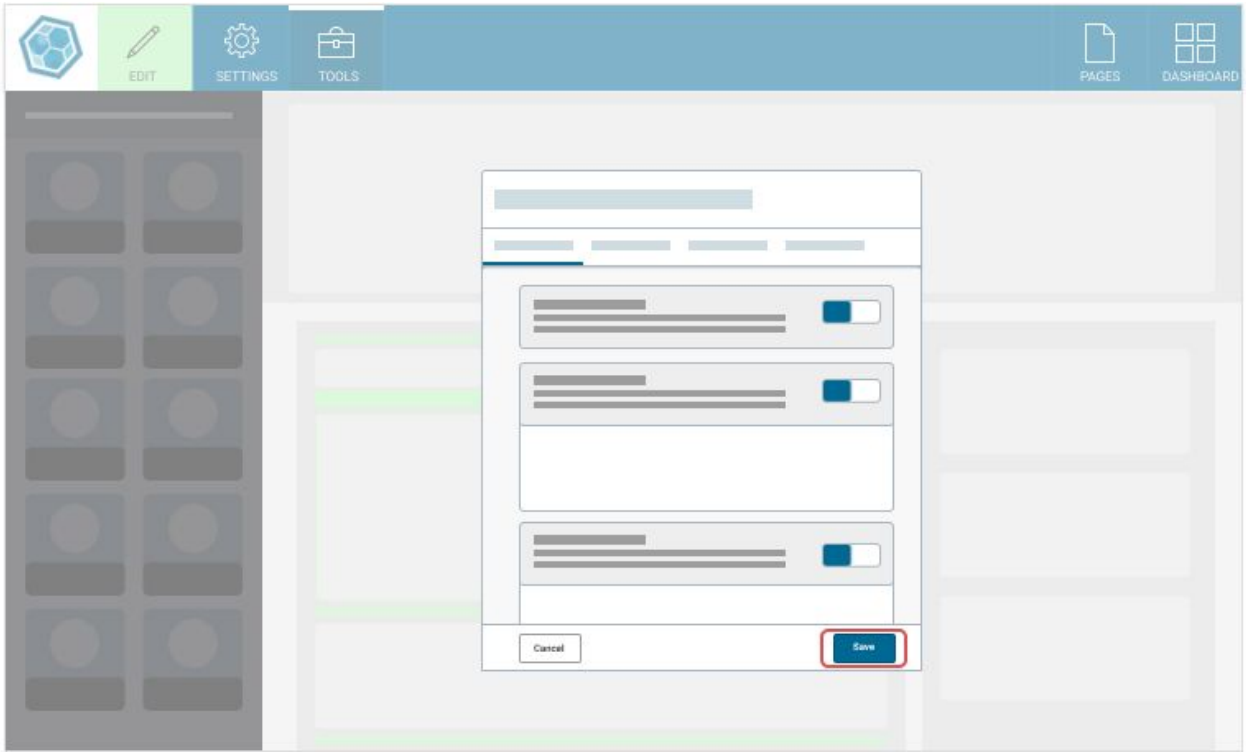
To add content to a page:

1. Select the **Tools** button in the Toolbar to open the **Tools Panel**.
2. **Drag (and hold)** the desired tool from the Tools Panel and move to the desired position in the available **Content Areas**. Thin green lines on the Project Canvas will indicate where Blocks can be dropped.



3. **Drop (release)** the tool into desired position to deploy the tool and open its settings dialogue. A thick green line will appear to indicate where a tool will be added.

4. Adjust the **Block Settings** of the tool as appropriate and select **Save**.

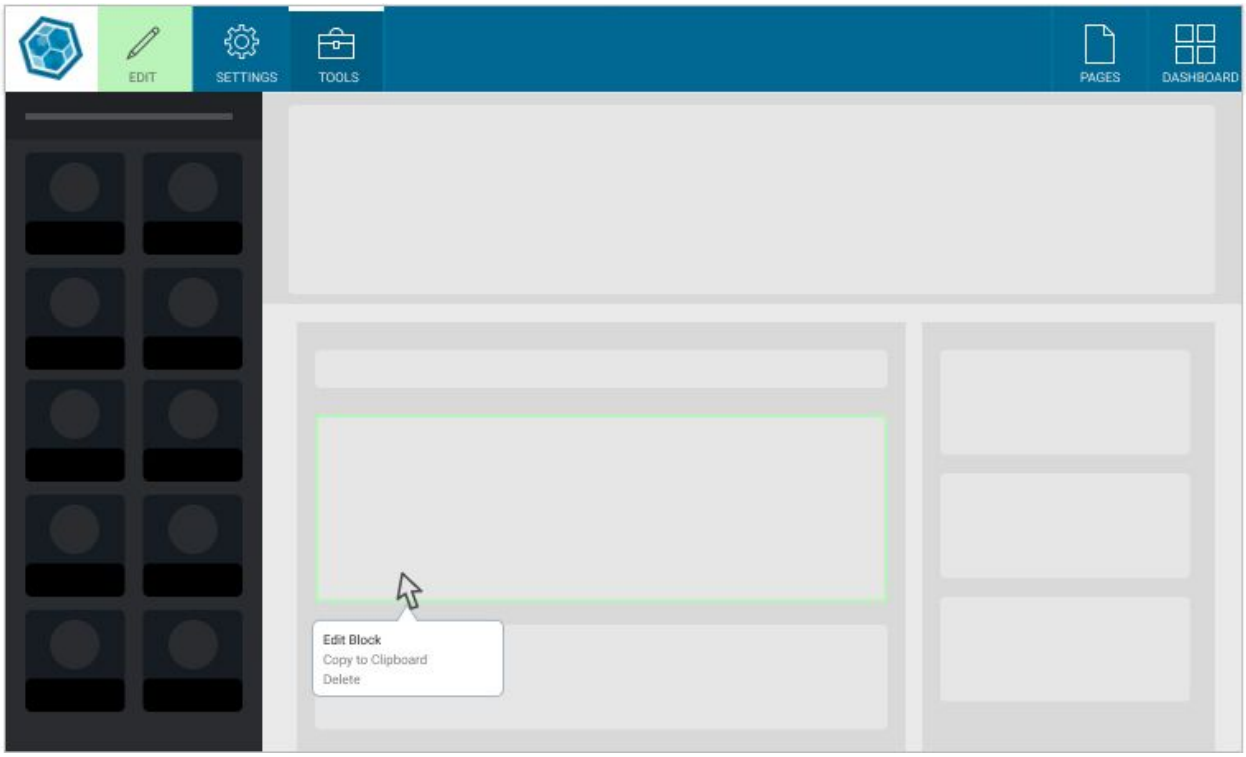


Every tool added to a page has a number of settings that can be configured by a User. These settings may turn certain features on or off, control display properties, allow categories to be configured and populate content.

Editing content

To edit the content or settings of a Block that is already on the page, you must access the Block Settings as follows:

1. Once the page is in edit mode, mouse-over or tab to the target Block and left-click or press enter. This will open a new context menu.
2. Select the **Edit Block** link from the context menu.



3. Adjust the content and settings as desired. When finished select the **Save** button at the bottom right of the Block Settings window.

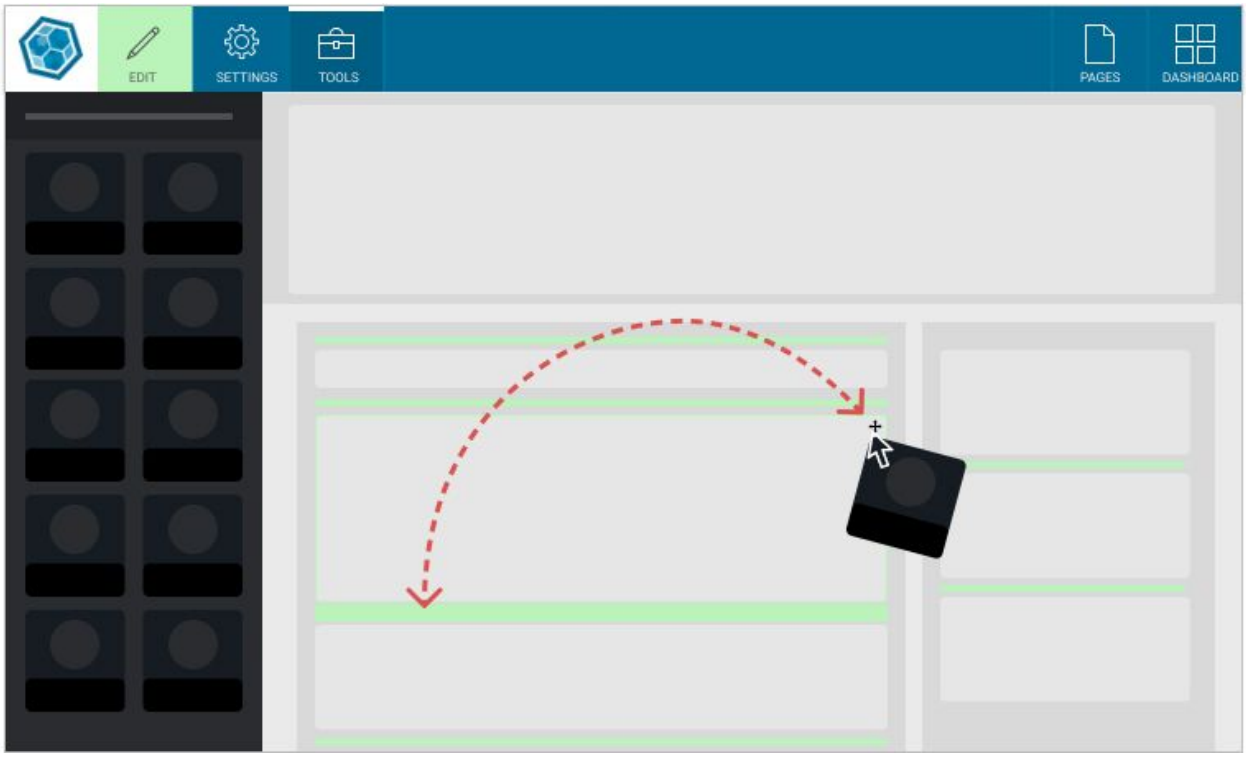
Rearranging content

Content Blocks can be arranged in any order and easily moved or rearranged on the page including moving them within or between Content Areas.

To move existing Blocks on a page:

1. Once the page is in edit mode, mouse-over the target block.
2. Click and hold the left-mouse button over the **move icon** at the top-right of the block.

3. While still holding the left mouse button, drag the block to the desired location. The thin green lines indicate where a block can be dropped.
4. Release the left mouse button in the desired location indicated by the thick green line.



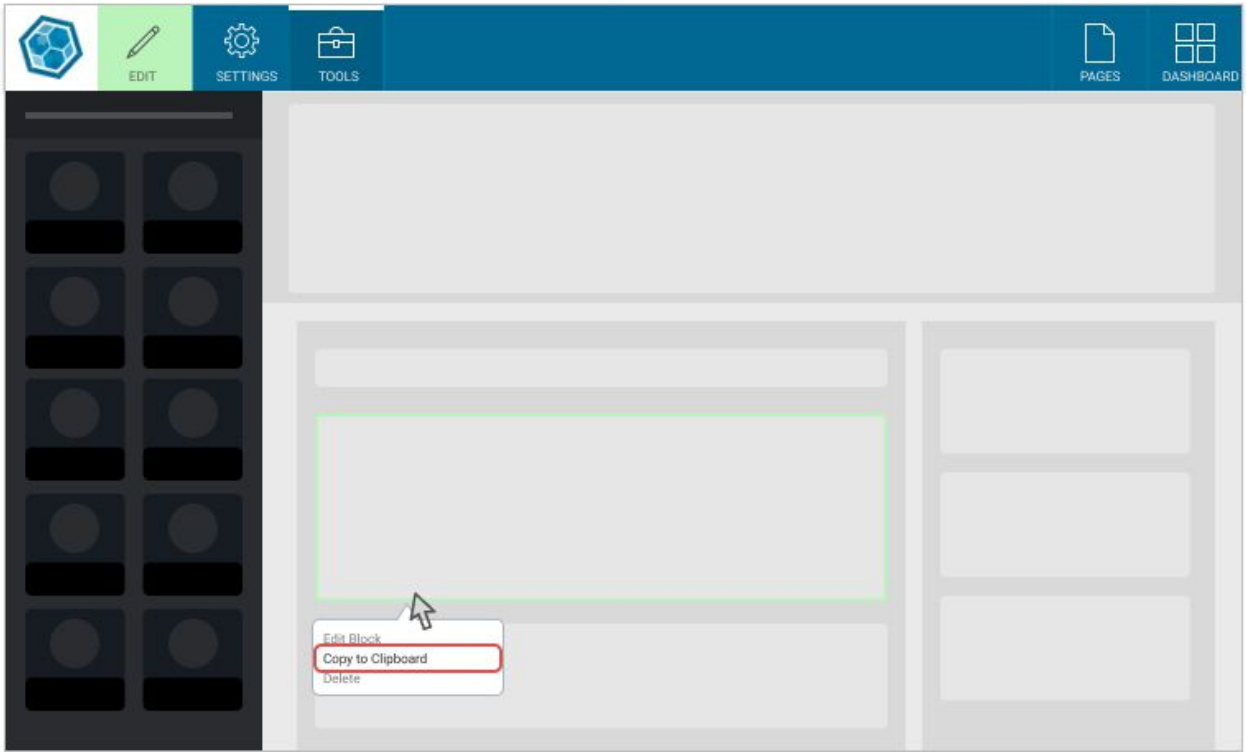
Copying and pasting content

Blocks can be easily duplicated by copying them to the **Clipboard**. Blocks will then be available in the Clipboard area of the Tools Panel, and can be reused as many times as required on any page.

To copy content to the Clipboard

1. Navigate to the target page with the content to be copied.
2. Open the dropdown menu on the target Block by left clicking on a mouse or navigating to the block and pressing ‘enter’ on the keyboard.

3. Select the **Copy to Clipboard** function from the dropdown menu.



Warning

The maximum number of items allowed in the clipboard is 50 items. Items inserted into the clipboard more than 3 months ago will be deleted when the clipboard is opened.

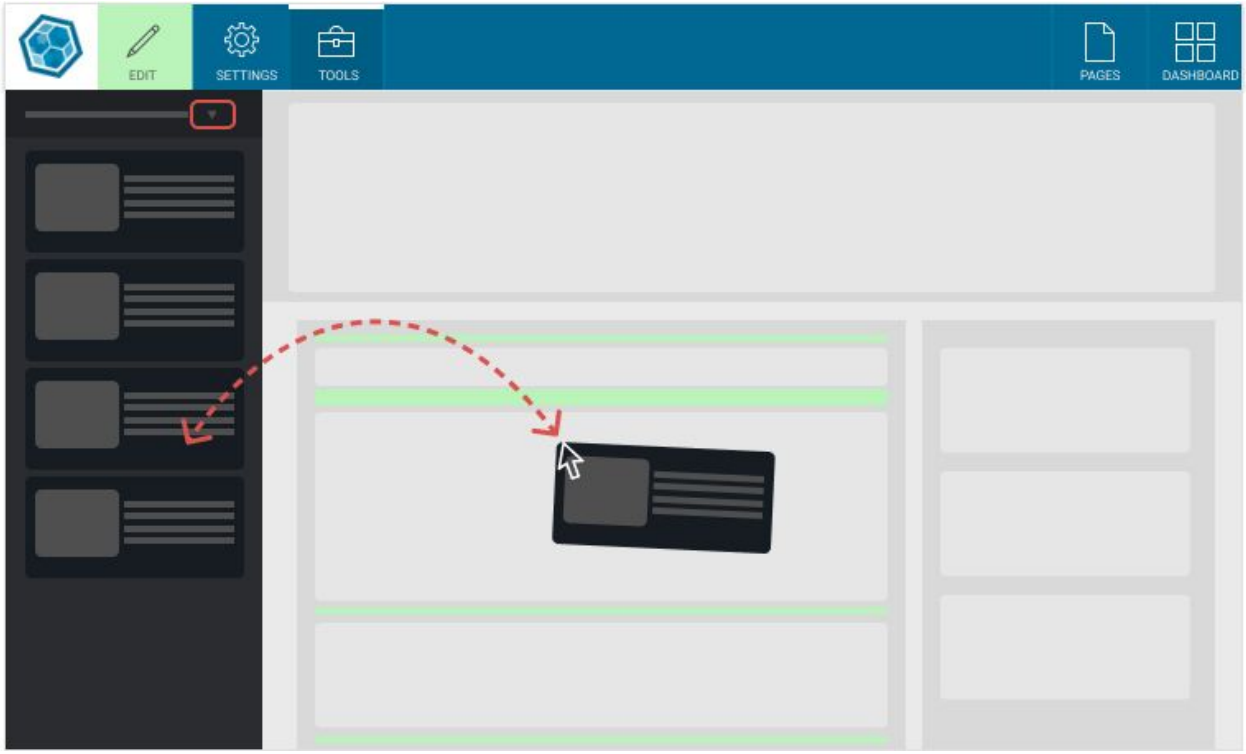
To paste from the Clipboard

Blocks copied to the Clipboard can be **pasted** onto any page of a site. Clipboard items will remain after being pasted and can be reused as many times as necessary.

To paste items from the Clipboard:

1. Navigate to the target page where content is to be pasted
2. Open the Tools Panel by selecting the Tools function from the Toolbar
3. Open the Clipboard by selecting the dropdown on the **Blocks** option at the top of the Tools Panel and selecting **Clipboard**

4. Drag and drop the target Block from the Clipboard into the desired position on the page.



Saving, publishing and scheduling

Content building on The HiVE can be saved by a User who can work on **draft edits** for new, unpublished projects, or even make edits on future, unpublished versions of projects and pages while the current version is still live.

Saving a draft

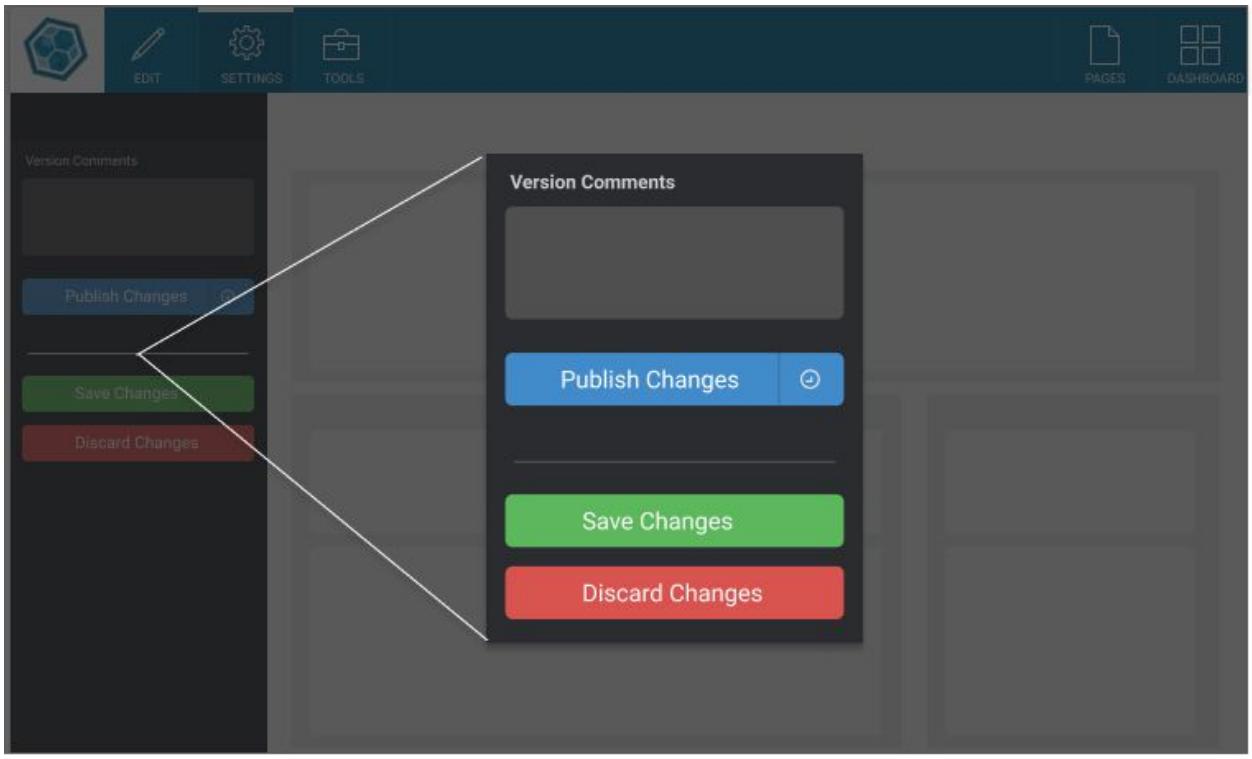
When a new page is added to a Site, a **draft version** is created which allows Users to make content edits before a page is published. The draft page is added to the **Drafts** folder in the Sitemap, until it is published and made live.

Users can also make **draft edits** to existing pages by saving a new, unpublished version of the page. This allows content to be worked on 'behind the scenes' until the draft version is ready to be published to the public.

To make draft edits to a new, unpublished page or an existing, published page:

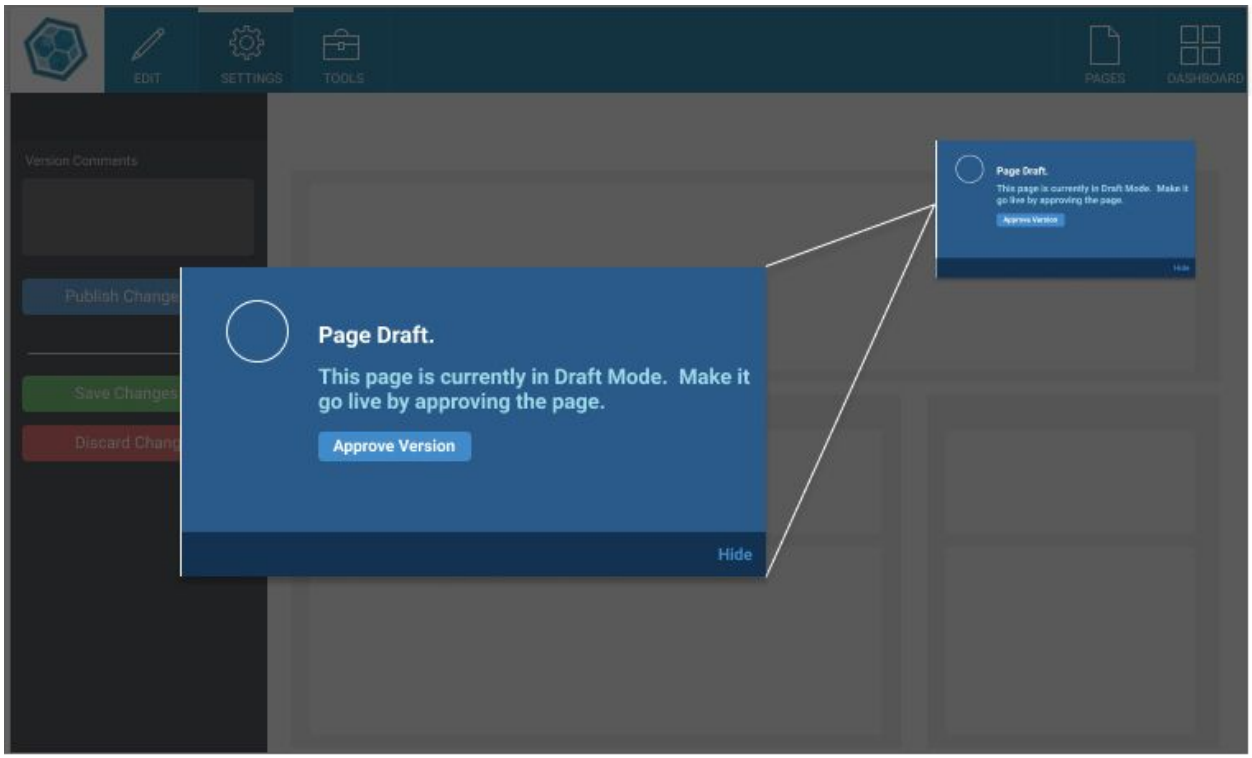
1. Make content edits to the draft as required

2. Open the **Publishing Panel** by selecting the **Save** function on the Toolbar (or selecting the Edit function on the Toolbar if the page is not in Edit Mode)
3. Choose the green **Save Changes** button from the Publishing Panel. This will update the contents of a **new draft** page or create a **new, unpublished version** of a live page.

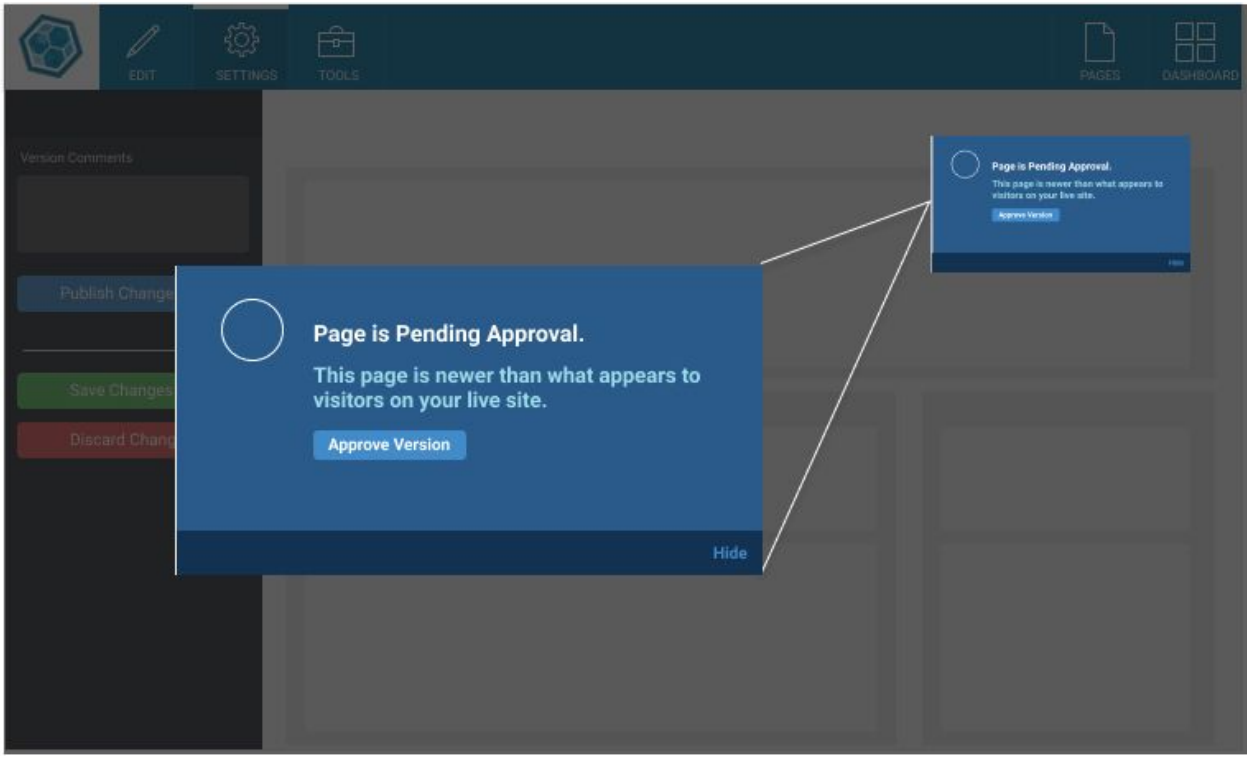


Users will be alerted that they are viewing a draft page or draft changes with the following alerts being displayed:

- **Draft pages**: This page is currently in Draft Mode.



- Draft changes to a **production version**: Page is Pending Approval. This page version is newer than what appears to visitors on your live site.



Choose the ‘Save Changes’ option from the Publishing Pane when making edits, rather than ‘Publish’ or ‘Submit to Workflow’ until all final edits are completed. This will reduce the number of page versions created and avoid confusion and noise associated with workflows (if enabled).

Publishing a draft Project for the first time

Once all content edits have been finalised on a draft project page, the project can be published to make it ‘go live’.

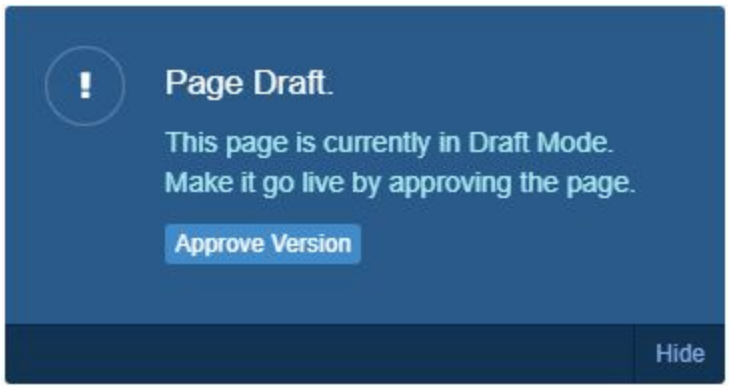
While In Edit Mode:

1. Navigate to the Project Page and Select the **Save** function in the Toolbar (this will appear where the Edit function is when not in Edit Mode)
2. Select the blue **Publish Page** or **Submit to Workflow** button in the Publishing Panel (this function will depend on the User’s publishing permissions).

While not in Edit Mode:

1. Navigate to the draft Project Page. A draft Project will display a notification that reads **This Project is currently in Draft Mode**.

2. Select the **Approve Version** or **Submit to Workflow** button in the draft notification message.



Publishing pages

Once draft content edits have been finalised, changes can be published and made live.

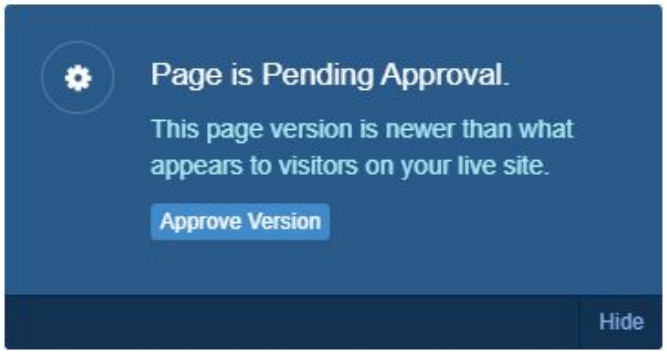
There are two ways to publish draft content changes:

Method 1: Publishing Panel

1. Navigate to the target draft page or published page as required
2. Open the Publishing Panel by selecting the **Save** function on the Toolbar (or selecting the **Edit** function on the Toolbar if the page is not in Edit Mode)
3. Choose the blue **Publish Changes** or **Submit changes to Workflow** button from the Publishing Panel (this function will depend on the User's publishing rights).

Method 2: Draft Notification Message

1. Navigate to the target draft project page. The draft project page will display a notification **Page is Pending Approval** and provide an option to **Approve version** or **Submit to Workflow**.
2. Select the **Approve Version** or **Submit to Workflow** button in the draft notification message.



Approval workflows

For customers with **workflows** enabled, content changes can be controlled so that Users who do not have publishing rights can pass their changes to Users with publishing rights for review and approval.

Content edits made by some Users may be subject to an approvals process prior to publishing, if workflows are enabled on a Site. Workflows force content changes made by Users without publishing rights, such as Project Authors, to be submitted for review to Users with publishing rights, such as Project Leads, Team Leads, and Site Administrators.

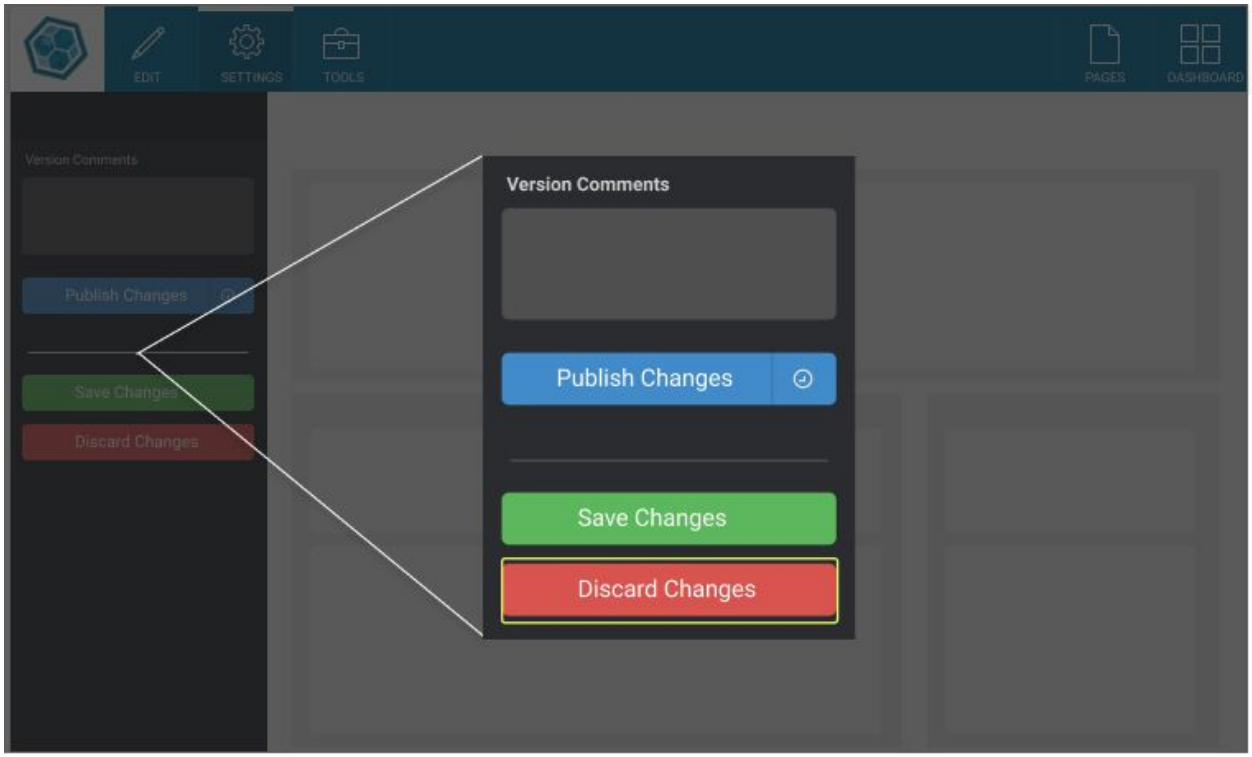
The workflow process is as follows:

1. The **requester** (e.g. Project Author) submits proposed changes as part of a new page version by selecting **Submit to Workflow**.
2. The **approver** (e.g. Project Lead) receives an email notification alerting them that changes have been submitted to them for review.
3. The approver visits the amended page (e.g. by following the link in the email or navigating to the **Workflow** area of the **Dashboard**) where they can compare the proposed version with past versions, **approve** the changes, or **reject** the changes.
4. If a requester's changes are approved by the approver, the changes will be published and the requester will receive a notification of the successful approval.
5. If the changes are rejected, the requester will receive a notification of the unsuccessful changes, with the approver able to provide a message to the requester letting them know why the changes have been rejected.

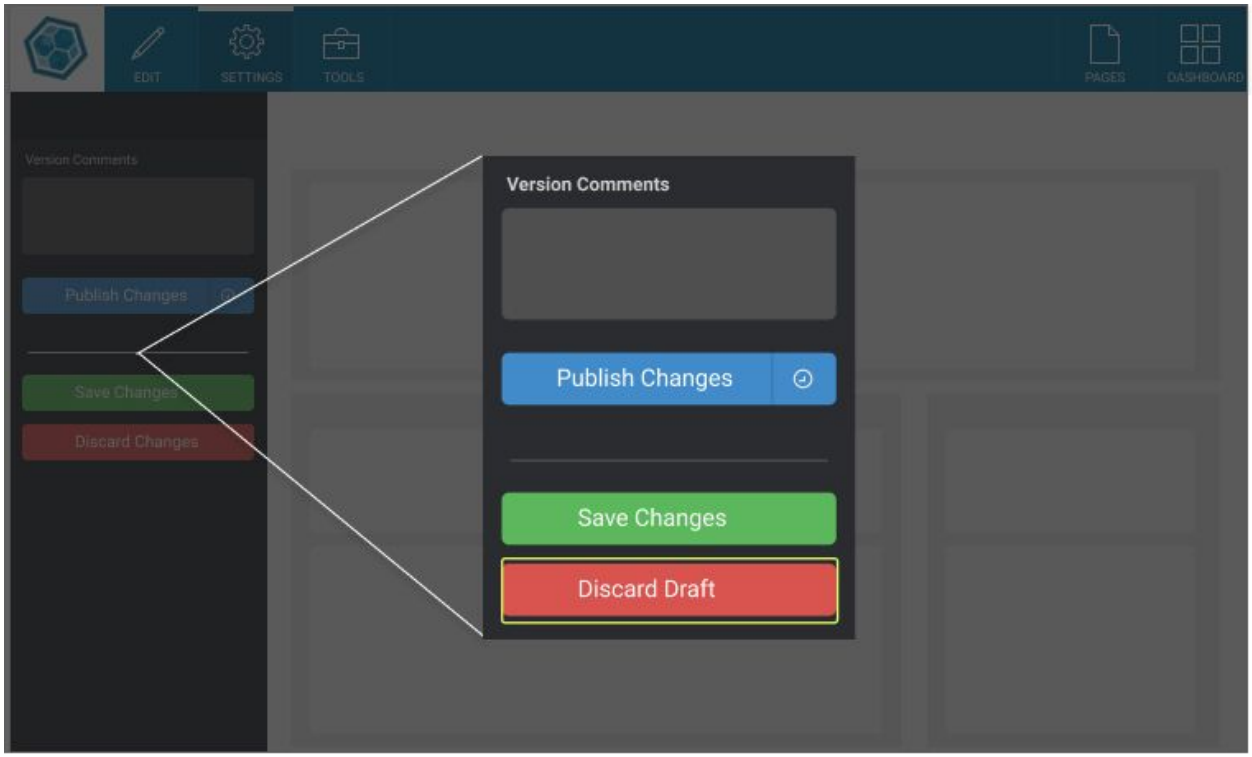
If you are assigned as a Project Lead and other Users have submitted their proposed changes to you via a workflow, you can view a list of all workflow requests in the **Workflow** area of the **Dashboard**.

Discard draft edits

Draft edits can be discarded by Users who no longer want their edits to be saved. To discard changes on a published page after making content edits, navigate to the Publishing Panel and choose the red **Discard Changes** button. This will undo any changes made in the editing session and revert to the previously saved page version and its content.



Draft pages can also be **discarded** if they are no longer needed. To discard a draft page, navigate to the Publishing Panel and select the red **Discard Draft** button to delete the draft page and all its content.



Warning

While the **Discard Changes** (on published pages) and **Discard Draft** (on draft pages) functions appear similar in the Publishing Panel, be aware that the Discard Draft option will **permanently delete** the entire draft page, not just the edits that have just been made.

Schedule publishing

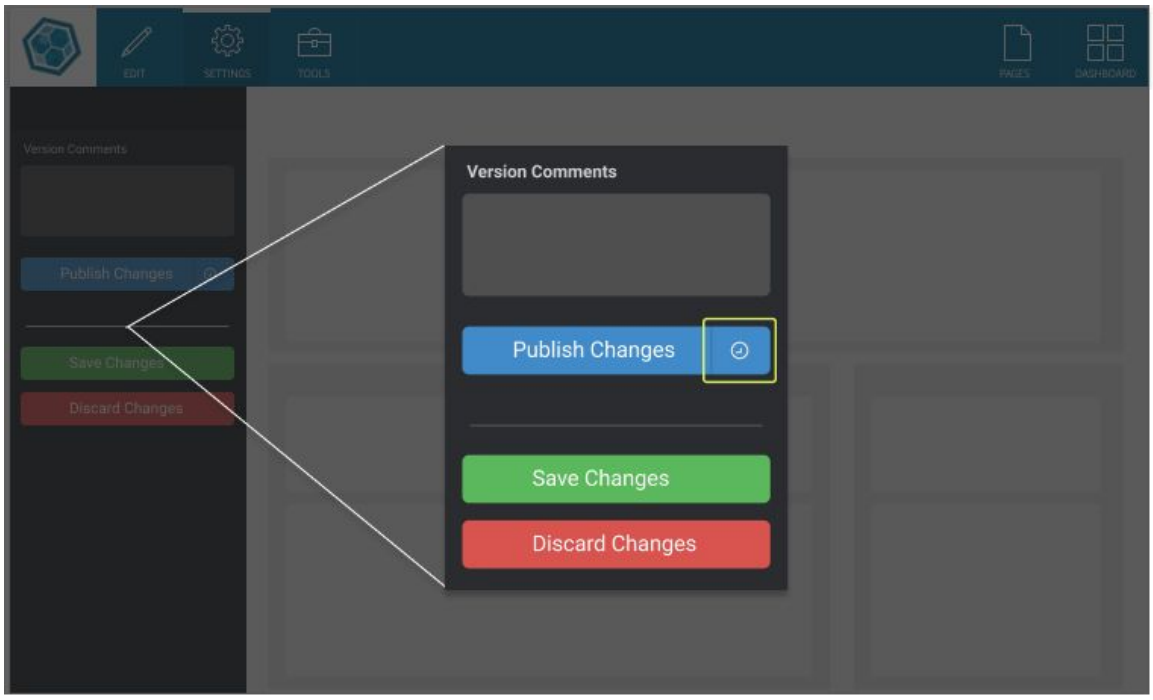
The launch of a new page or updates to an existing page can be scheduled to publish automatically at any time or date.

This feature is particularly useful if you need to send multiple drafts or new versions live at the same time or publish changes outside of business hours.

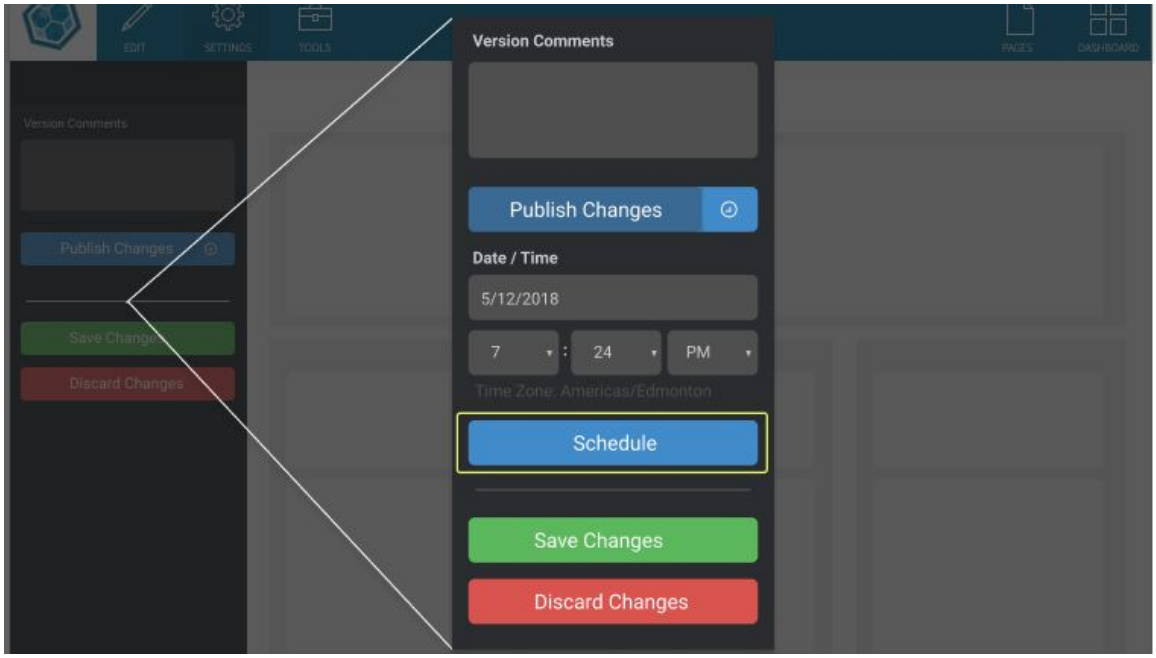
To schedule publishing:

1. Open the Publishing Panel in the same way you would when manually publishing a page.

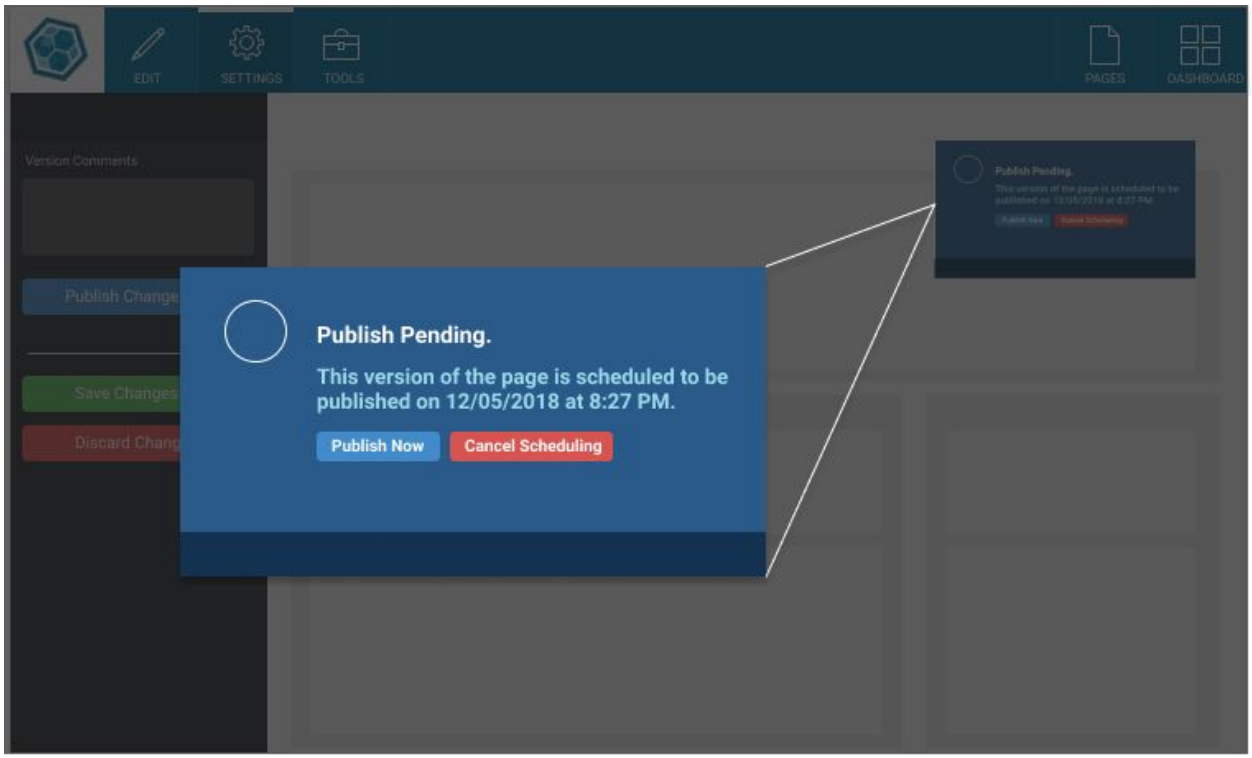
2. Select the **clock** icon next to the **Publish Changes** button. This will present options to set the specific date and time you would like the draft page or new version to be published. It will automatically be configured to the timezone of your site.



3. Set the desired date and time and select the **Schedule** button.



After this has been done, a notification will appear on the page detailing the scheduled date and time. You also have the option to publish the page immediately by selecting the **Publish Now** button or can cancel the scheduled publish by selecting the **Cancel Scheduling** button. Cancelling the scheduling will keep the page in a draft state until it is ready to be published again.



Scheduling with Workflows Enabled

If you have approvals workflows enabled on your site and do not have publishing rights, your scheduled publishing will need to be sent to an approver (e.g. Project Lead) to approve the page.

If they do not approve the page prior to the proposed schedule publishing date, the page **will not be published** until after it is approved.

Access data and reports

A number of reporting features within The HiVE help Users to evaluate the performance of a Site, Team, Group or Project using a number of built-in reporting metrics. In addition the data associated with the results of all participation activities can be viewed.

The **Reports** area of the **Dashboard** displays a number of reporting metrics across a number of available **report types**, which provide a different views of a Site's data.

The available report types include:

- **Sitewide** - Provides data and results across all project and Site pages. This report is available only for Site Admins.
- **Team** - Provides data and results for projects associated with a nominated Team entity (e.g. Department, Working Group, etc.). This report is available for Site Admins and Team Leads.
- **Project Group** - Provides data and results for projects associated with a nominated Project Group entity.
- **Project** - Provides data and results for projects associated with a specific project.
- **My Projects** - Provides data and results for all projects the logged-in User has been given rights to view (via assigned User Roles). By default the 'My Projects' reports type will be shown.

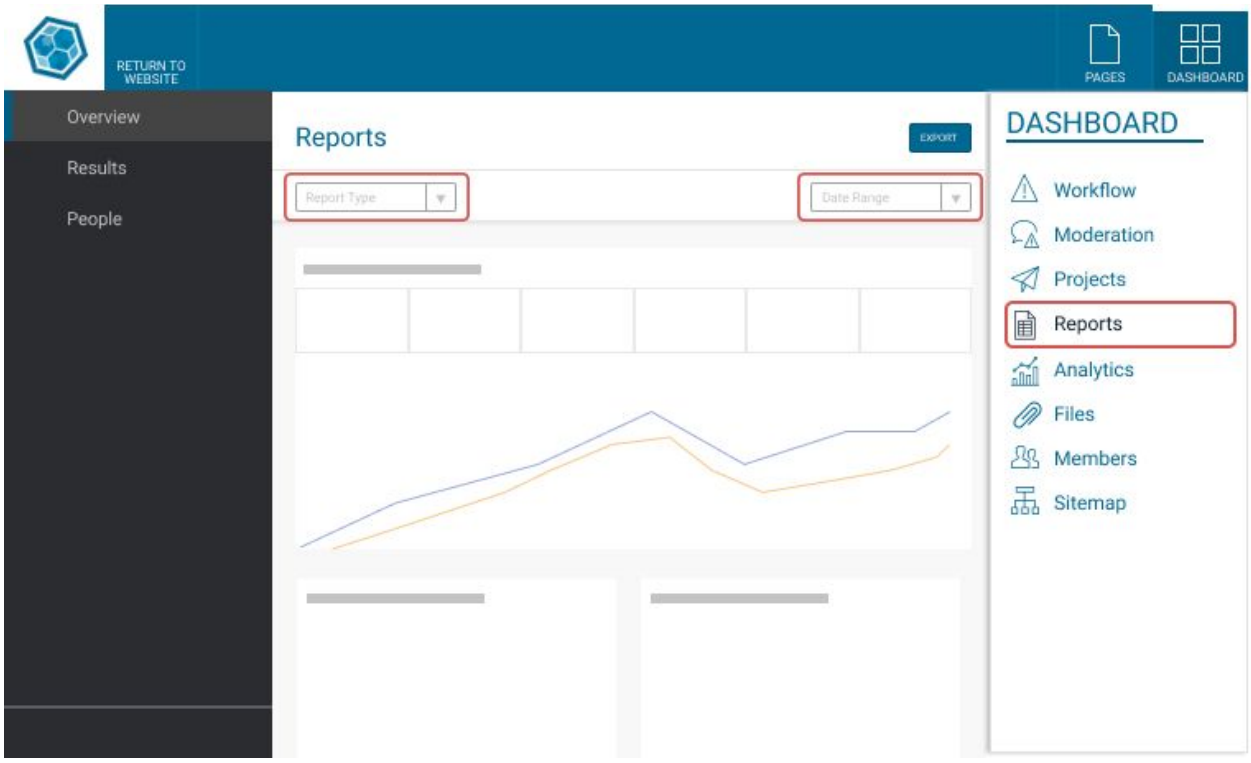
When viewing a report, the **Reports** panel appears at the left of the Reports area and allows the User to navigate various sections of the report including the following:

Overview - Displays key reporting metrics on the project(s) including an interactive time-based graphing tool and Engagement Index metrics. Overview Reports can be exported.
Results - Displays a list of all participation activities of a project(s) including key meta-data for each activity. From here, Users can drill-down into each activity to view the results of a single activity. Result reports and the participation data of a specific activity can be exported.
People - Displays information about the people who have participated in your engagement activities including their demographic information and interests.

Reports can not only viewed in the reporting area, but data can be exported out of the Platform in a number of file formats.

Select a report type and date range

Within The HiVE, Users can select the report type they would like to view and set a date range for the report.

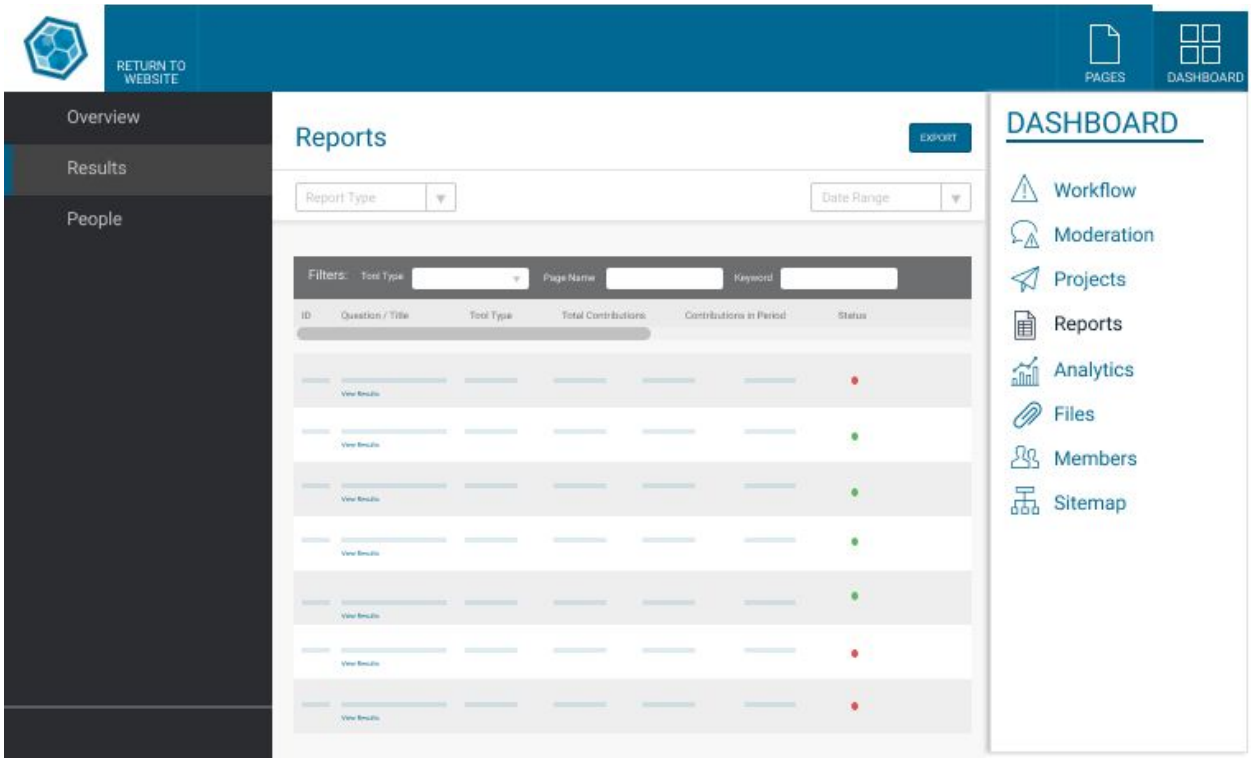


To change the report type and date range for a report:

1. Select the relevant report type from the dropdown menu at the top-left of the page. In some instances such as a Team or Project report, a second dropdown will appear with the option of selecting the specific team or project entity.
2. Select the desired date range from the dropdown menu at the top-right of the page. Date ranges can be selected from the date picker, including ‘Today’, ‘Yesterday’, ‘Last 7 Days’, ‘Last 30 Days’, and ‘All Time’ (from when the project was first published), or a custom date range can be selected.
3. All information and data contained in a report will be filtered based on the selected date range.

View and export participation results

The results of your participation activities are displayed in the **Results** section of the Reports area.

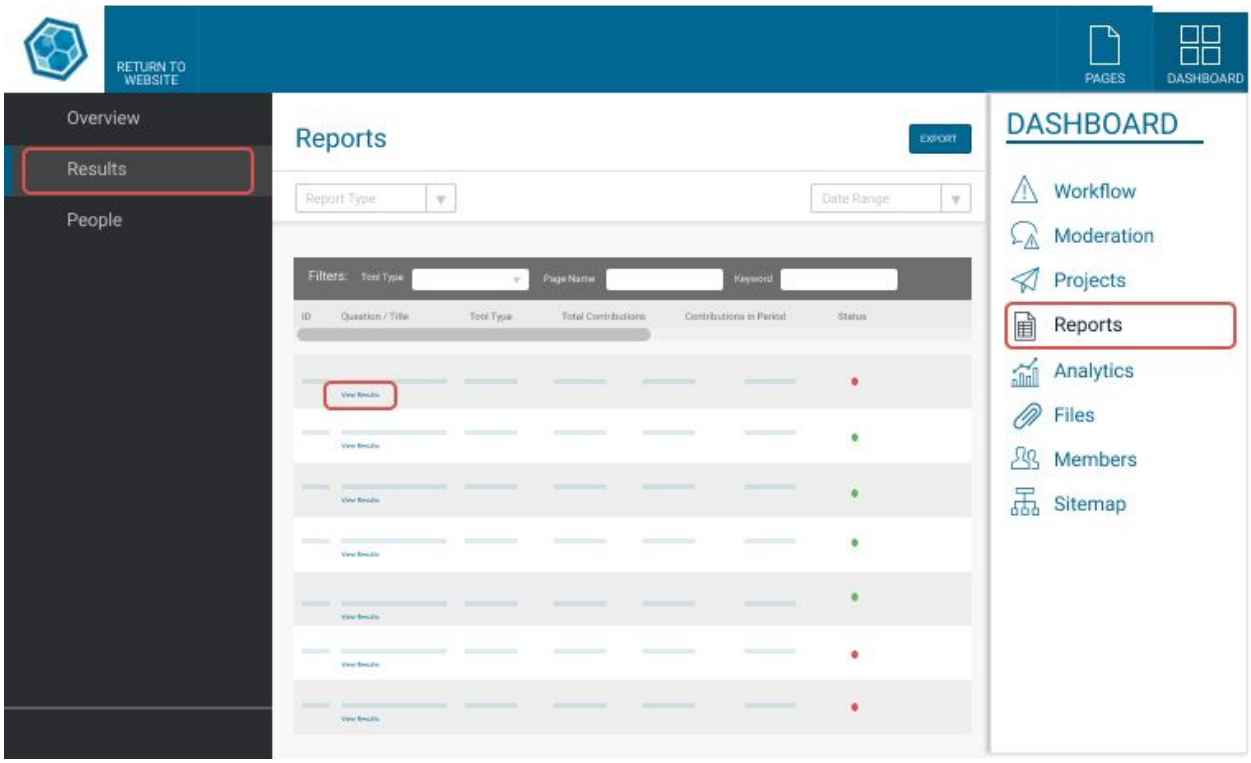


This section displays a list of all participation activities that have been added to the project since it was published along with the following data:

- **Question/Title** - Displays the Title or Question used in the participation activity.
- **Tool Type** - Indicates the type of participation activity used (e.g. social map, quick poll, visioner, form).
- **ID** - Provides a unique identifier for the activity for reference.
- **Status** - Indicates whether the activity has been marked as ‘active’ (taking Contributions) or ‘inactive’ (not taking Contributions).
- **Page Name** - Indicates the name of the page that the activity is located on.
- **Date Created** - Indicates the date the tool was published.
- **Open Date** - Indicates the date the activity was originally opened for participation as defined by a User in the Block Settings.
- **Close Date** - Indicates the date the activity was closed as defined by a User in the Block Settings.
- **Total Contributions** - Indicates the total number of Contributions for the activity since the project was published.

- **Contributions in Period** - Indicates the total number of Contributions for the activity within the specified reporting date range.

To view the data of each individual activity, select the **View results** link below the **Question/Title** field.



This will open a data table containing all the participation data (Contributions) submitted for the activity.
To go back to the Results report, select the **Back to Results** button at the top-left of the page.

Participation data showing the individual Contributions for a single participation activity can also be exported. To export participation data:

1. Navigate to the **Results** section of the **Reports** area
2. Click the link to **View Results** for the desired participation activity
3. Click the **Export** button at the top-right of the page and select the desired file type.

Participation data can be exported in **.xlsx** or **.csv** format.

Export reports

Reports and data can be easily exported from the Platform by clicking the **Export** button at the top-right of the **Reports** page. This will open a dropdown and allow the User to select the available file formats.

