Introduction

The Community Management Console provides great productivity tools for community managers and others who are responsible for monitoring, managing, or ensuring high levels of engagement in a community. The Insights panel currently allows anyone with access to the Community Management Console to find and respond to unanswered questions, find hot topics, engage new and top users, monitor moderation & flagging activities, and take many other actions directly in the community...with high productivity.

This component allows you to add a tab for Ideas shared in the community to the Insights panel, allowing a community moderator to see top ideas & recent ideas. These reports can also be modified to include other criteria, such as delivered ideas or new ideas.

Important Notes

As of the Spring '16 release, there is no out-of-the-box way to surface Ideas in communities driven by the Napili (or other) community templates. Only tab-driven communities can easily surface Ideas functionality for external users. It is possible to build custom Lightning Components for community cloud to expose Ideas. These Insights reports work well with that setup, linking directly to Idea details from the Community Management Console.

This package is unsupported, and no warranty or guarantee is provided.

Prerequisites

This guide assumes the following:

- You have a community configured in your org, with Ideas active and exposed to community users via a tab or custom Lightning Components.
- Your community has at least one Ideas zone configured and associated with your community.

Installation

Log in to your org as an administrator. Install the Insights for Ideas AppExchange package. This package will install a custom report type, a report folder, and two reports into your org:

Package Components

Action	Name	Parent Object	Type
	Ideas - Recent Contributions		Report
	Ideas - Top Vote Scores		Report
	Insights Ideas		Report Folder
	Ideas for Insights		Custom Report Type

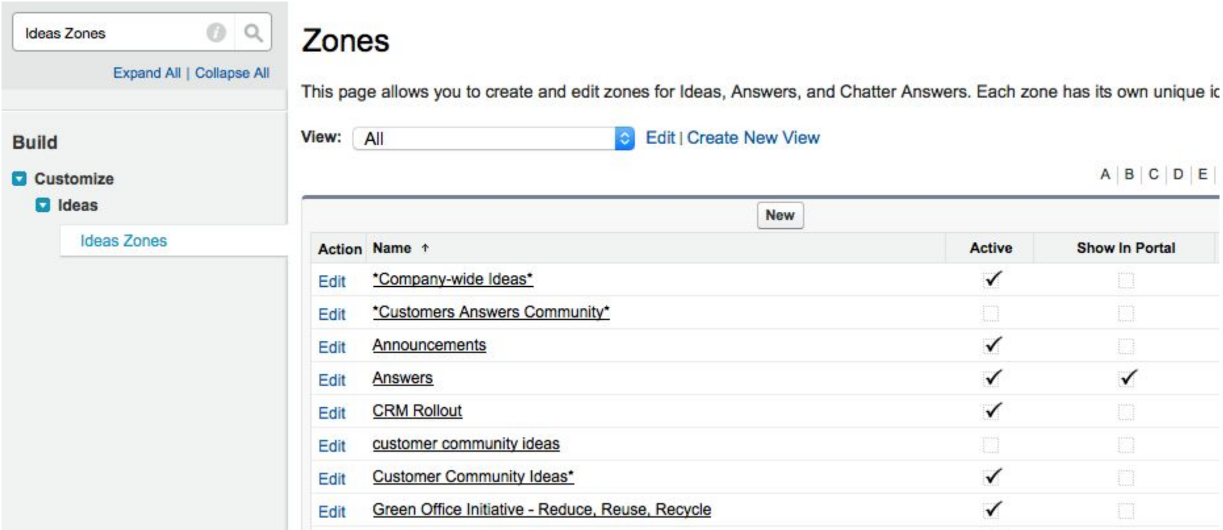
Some additional configuration is necessary to get these reports working.

Configuration

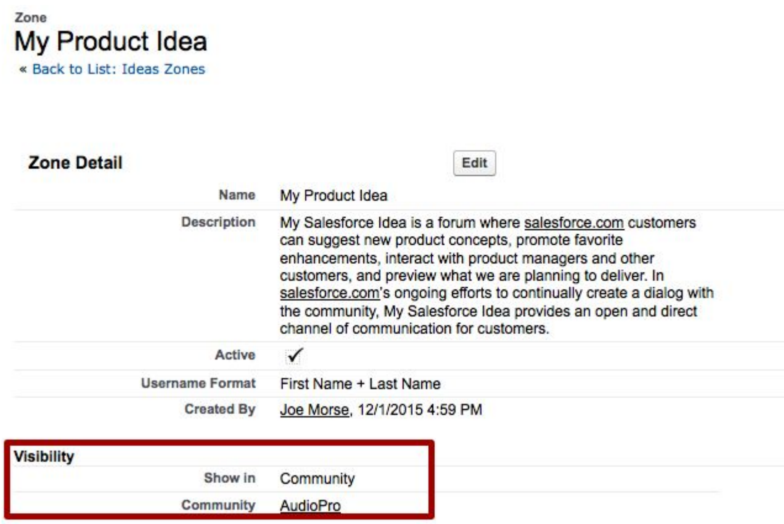
Step 1: Determine your Community's Ideas Zone

Zones allow Ideas to be categories and secured by audience. The reports in this package filter ideas by Zone. Each Salesforce org can have its own uniquely-named Zones, and some of those Zones can be associated with legacy portals and modern communities. It will be necessary to obtain the zone name(s) associated to the communities you want to report on.

Under **Setup**, navigate to **Build→Customize→Ideas→Ideas Zones** to see the list of zones in your org:



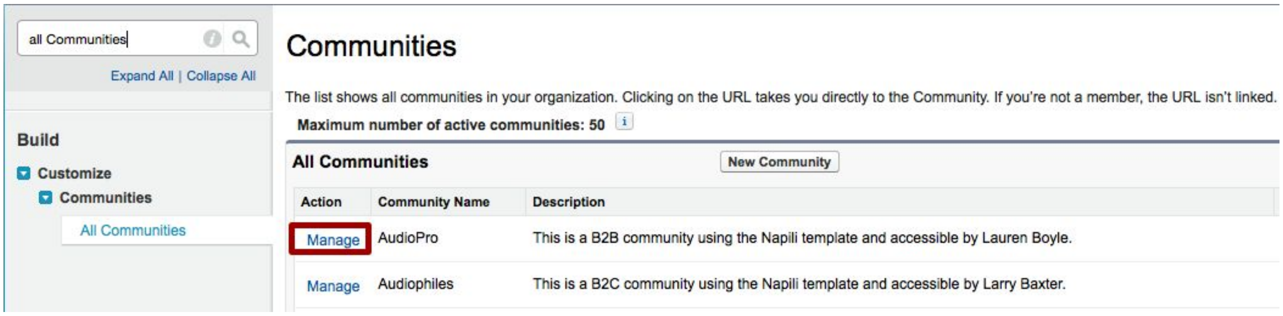
IMPORTANT NOTE: One or more of these zones will likely have the **Show in Portal** checkbox checked. This indicates that this zone is NOT configured for a community, but for the legacy portal products. You will need to inspect each Zone in your org to determine which ones have been configured to appear in your community. On the Zone Details page, look for the Visibility section:



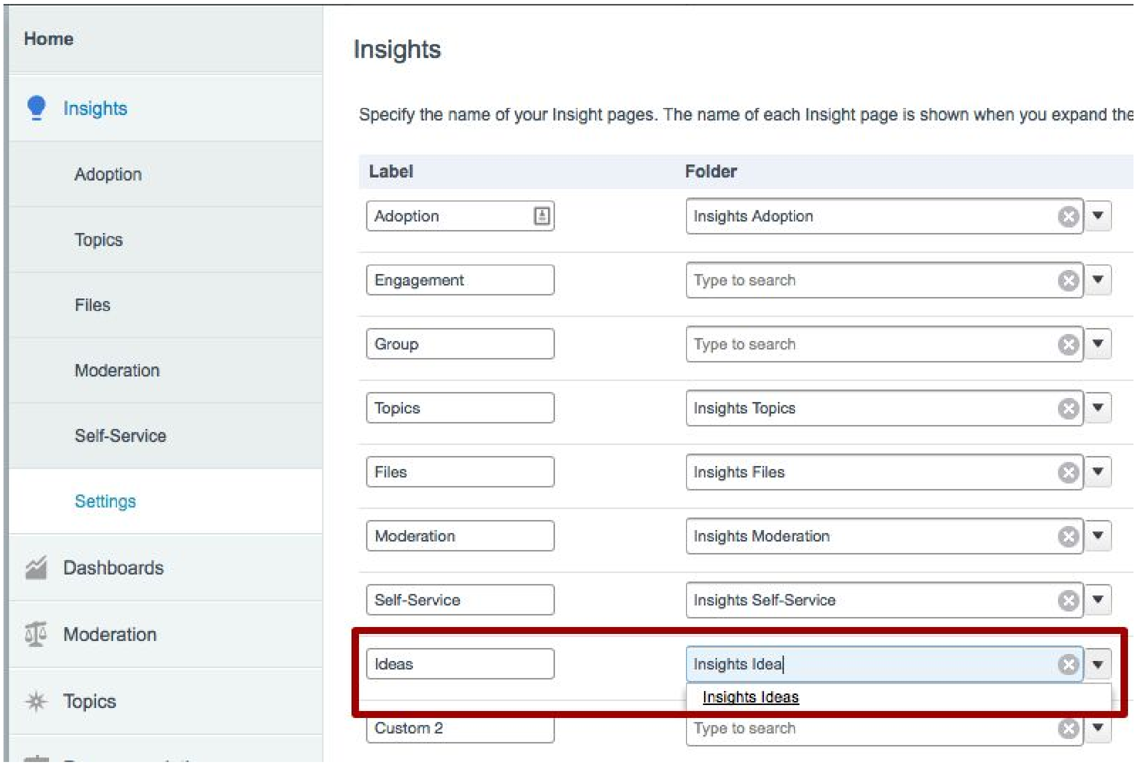
Inspect each Zone and record the **Name** of the ones that are visible in the community you intend to use these reports with.

Step 2: Configure your Insights Panel to include Ideas

The Community Management Console runs in the context of the community you are managing. Since a single Salesforce Org can have multiple communities, you will want to navigate to the community you are using by visiting **Setup** and navigating to **Build→Customize→Communities→All Communities** and clicking the **Manage** link next to the community associated with the Zone(s) you recorded in Step 1:



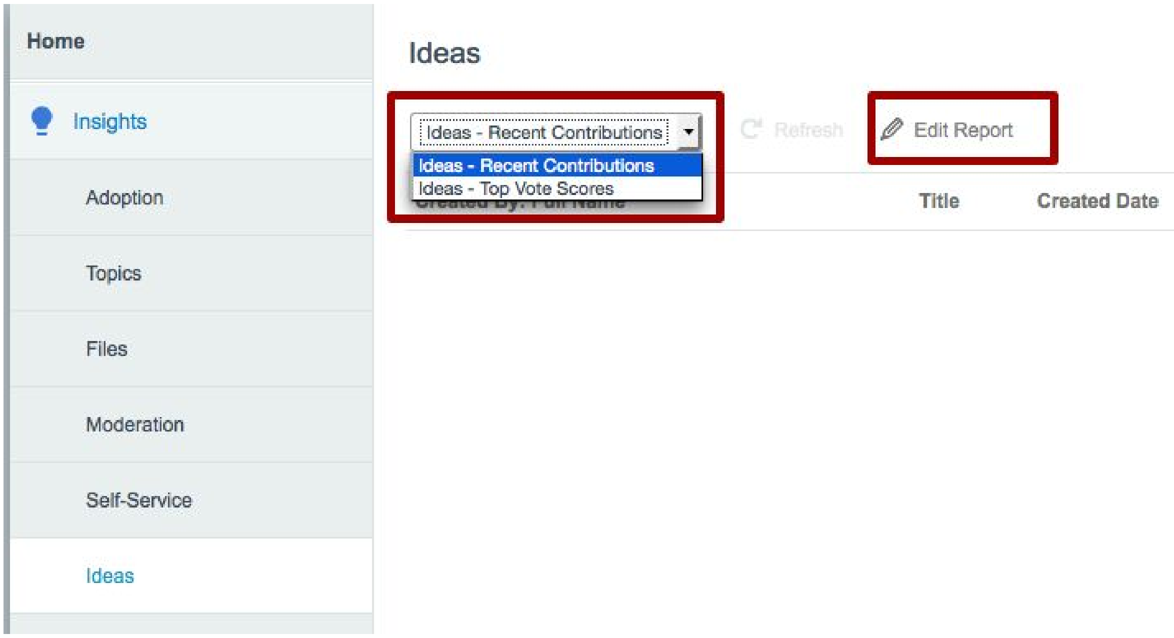
Once in the Community Management Console, Navigate to **Insights→Settings**. Each panel in Insights corresponds to a report folder, and we will map the report folder you installed above to a new panel under Insights. There will be several extra panes with Labels like **Custom 1** that also have no report folder assigned. Rename one of them to **Ideas** and map that pane to the **Insights Ideas** report folder:



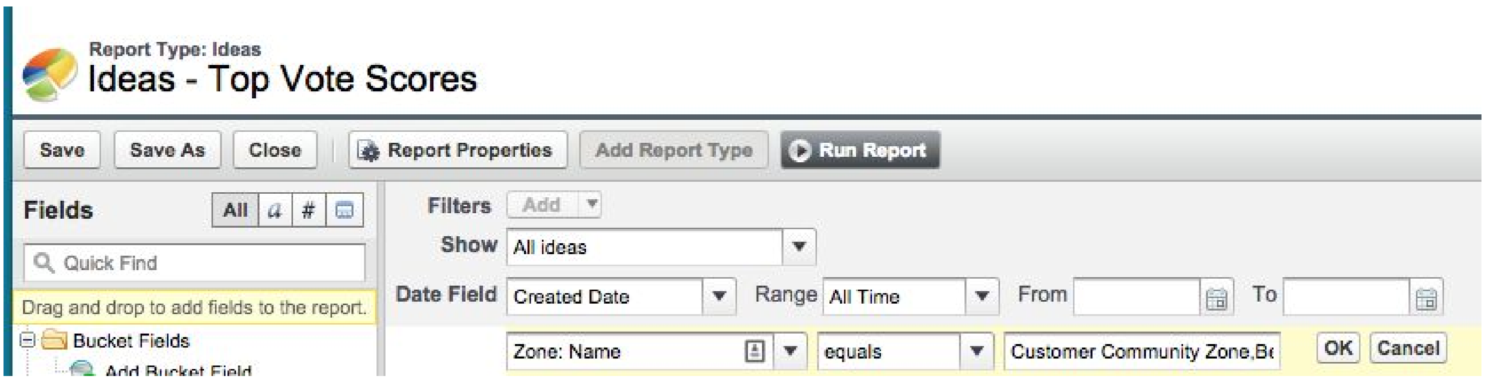
Be sure to hit the Save button. A new Ideas pane will appear under Insights. You must now change the filters on the reports to filter ideas down the the Zones you discovered above.

Step 3: Edit Each Report in the Package to Include Your Zone

Navigate to the new **Ideas** pane in the Insights panel. The reports you installed are now available in the report dropdown. You will also have a link to edit each report:



Edit each report and change the **Zone: Name** filter to match the Zones you acquired in Step 1. Note that you can include multiple values by separating each one with a comma:

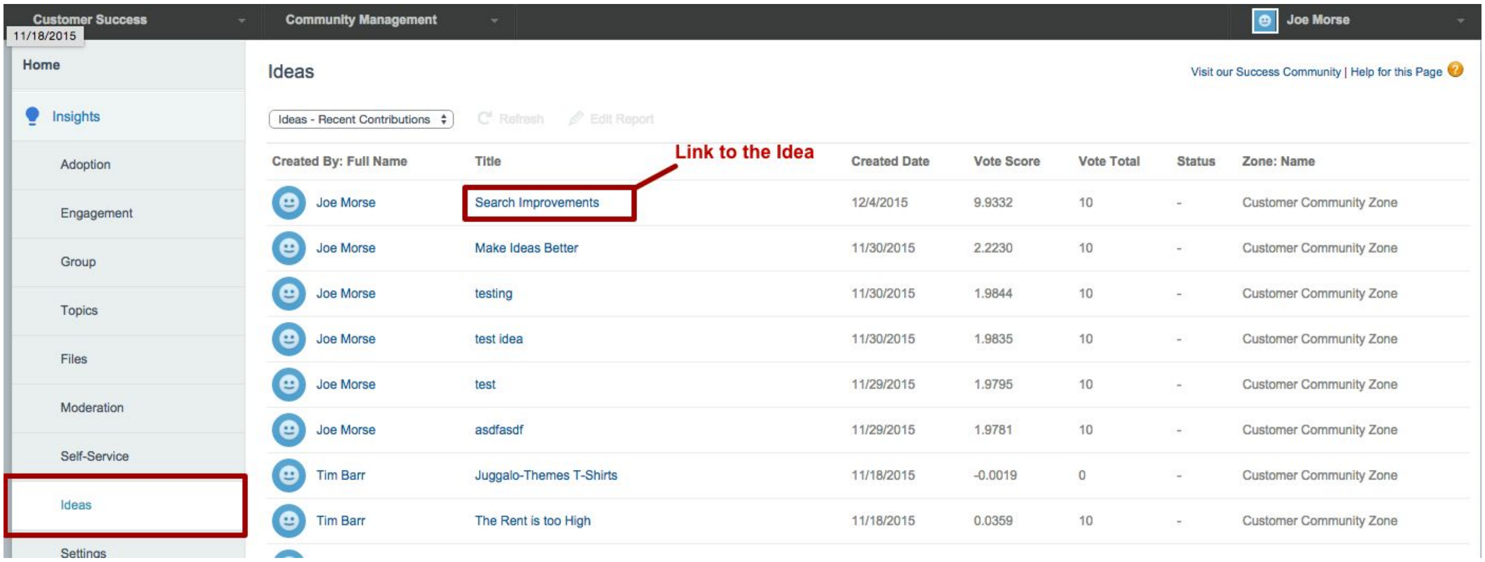


Save the report, and return to the Insights panel. Repeat for each report in the folder.

NOTE: You can save copies of any of these reports in the same folder and they will appear in the Insights panel. Only **Tabular Format** reports are supported.

Using the Insights Panel

If there are any ideas in the Zones specified, the Insights panel will now display them, alongside links to their authors' profiles and links directly to the Idea record in the community:



Created By: Full Name	Title	Created Date	Vote Score	Vote Total	Status	Zone: Name
Joe Morse	Search Improvements	12/4/2015	9.9332	10	-	Customer Community Zone
Joe Morse	Make Ideas Better	11/30/2015	2.2230	10	-	Customer Community Zone
Joe Morse	testing	11/30/2015	1.9844	10	-	Customer Community Zone
Joe Morse	test idea	11/30/2015	1.9835	10	-	Customer Community Zone
Joe Morse	test	11/29/2015	1.9795	10	-	Customer Community Zone
Joe Morse	asdfasdf	11/29/2015	1.9781	10	-	Customer Community Zone
Tim Barr	Juggalo-Themes T-Shirts	11/18/2015	-0.0019	0	-	Customer Community Zone
Tim Barr	The Rent is too High	11/18/2015	0.0359	10	-	Customer Community Zone