simpplr.

Segments
Spring 18

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Segments

Introduction

As companies grow larger and more complex, they typically want to have more control to customize experiences for different users. For example, different brands, locations, or subsidiaries may want to tailor the intranet's content and branding for their specific employees.

Our new 'Segments' administrative capability allows an organization to provide these tailored experiences for different groups of employees within a single company-wide intranet. Employees can be segmented based on either division, company, or country. Each respective Segment gives administrators more flexibility with Branding, Home Default and Home settings (e.g. the Carousel and Dashboard configurations), and which Sites are Featured.

Features that are Segmented	Features that are not Segmented
Branding (if selected) Home Default Home (Carousel & Dashboard) Featured Sites	Branding (if not selected) Sites Content Feed Topics Search People Index

Glossary

Segment Field

The Segment Field is the Profile Field that Segmentation is based on. This allows you to build Segments based on either Division, Company or Country.

Segment

A Segment is a subset of the employees in an organisation, grouped by their Segment Field (e.g. Division, Company or Country).

Segment Manager

A Segment Manager is responsible for managing the Branding, Home Default, Home & Featured Sites of their Segment.

Prior to Enabling Segments

Before you Enable Segments it is important that the people data in your organization is up-to-date and complete.

You can base Segments on either Country, Company or Division. Once Segments is Enabled any user who does not have a value for this Profile Field will be completely locked out of the app until the value is added.

Segments cannot be Enabled for a Profile Field that the App Manager has blank.

- E.g. The App Manager Enabling Segments has no value set for Country
  - They cannot Enable Segments based on Country

If only the App Manager has a value for the Profile Field it is possible to Enable Segments.

- E.g. The App Manager Enabling Segments has a value set for Country, but no other User does
  - They can Enable Segments based on Country
    - App Manager can access the app, all other Users will be locked out

Whether the Profile Field selected is User Editable or not prior to Segments being Enabled, once it has been used for Segments it will automatically be locked to Non-Editable until Segments are Disabled.

Enabling Segments

Only an App Manager can enable the Segments feature, from the new section

Manage Application > Segments.

Segments Setup

In **Manage Application > Segments** you can choose a Segment Field and whether or not you want Branding to be segmented. Once these choices are made, Segments setup can start.

Manage Application

Setup   Defaults   People   **Segments**   Integrations   Resets

Segments

Segments allow an organization to provide tailored experiences for different groups of employees. The following can be set for each Segment

- Home Defaults
- Home
- Featured Sites
- Branding (Optional)

Warning
Setting up or changing Segments will take some time, during which employees will be locked out of the app. If possible this should be done outside normal working hours

Segment method
Choose one of the following people data attributes to use for creating and managing Segments

○ Division

○ Company

○ Country

Manage Branding
This can be updated at any time

○ Individually for each Segment

○ Same for all Segments

Manage Branding

While setting up Segments you can choose for them to be branded individually or for the same branding to be used for every Segment.

- If you choose for Segments to be branded individually, once Segments are Enabled App/Segment Managers can set each Segment to have different Branding to reflect the nature of the Segment.

- If you choose for the same Branding to be used for all Segments, then when an App Manager updates the Branding it will affect all of the Segments.

Segment Field

The Segment Field is the Profile Field that segmentation is based on. The possible Profile Fields that can be set as the Segment Field are:

- Division
- Company
- Country

If you wish to change the Segment Field, you must disable Segments completely first, then re-enable it using the new Segment Field. Disabling Segments will result in the loss of all settings relating to the Segments previously made (See below for more information on disabling Segments)

On clicking 'Define Segments'', you will be taken into Setup Mode-

Defining the Segments

You can then define the segmentation:

- Profile Field values can be moved between Segments
- New Segments can be added
- Segments can be renamed
- Segments can be deleted
  - All Profile fields must be removed from the Segment before it can be deleted

Manage Application

Setup   Defaults   People   **Segments**   Integrations   Resets

Define Segments

Warning

Setting up or changing Segments will take some time, during which employees will be locked out of the app. If possible this should be done outside normal working hours

---

Segment   ✕

Segment Name

No Countries available

Countries
China (2), France (3), Japan (5), UK (4), US (6)

Total People   ⚇ 20

⊕

Add Segment

Segment   ✕

Segment Name:
US

No Countries available

Countries
France (3), UK (4), US (6), China (2), Japan (5)

Total People   ⚇ 20

Segment   ✕

Segment Name:
Asia

Add Country to Segment   ⌄

China   ⚇ 2 - US

France   ⚇ 3 - US

Japan   ⚇ 5 - US

UK   ⚇ 4 - US

US   ⚇ 6 - US

Top tip:

Any number of Segments can be added but we would recommend that the number is kept to a minimum.

Segments can be given any name, however for ease of management it is best to give them logical names that clearly relate to their content. Segment names must be unique.

For example:

If you have offices in:-

Shanghai, Bangkok, New York, Los Angeles, London and Paris

It may be best to create three Segments:-

Asia, US and Europe

- All Segment Field values must belong to a Segment, so if Segments is enabled, every employee should fall into one of those Segments (unless they do not have a value set for the Segment Field).

- It is not possible to have any Segments with no Field Values

- If there are any employees not belonging to a Segment (due to no value in the Segment Field, or them having a new value not yet assigned to a Segment), a warning will show at the top of the page - This will state "<appname> will be inaccessible to some employees". It will also give number of unassigned employees and option to download CSV with details of the unassigned employees.
    - Employees who do not belong to a Segment will be unable to access the Intranet.

- To correct this the employee's people data will need to be updated so that they are assigned a value for the Segment Field.

Removing Segments

- All values (e.g. divisions) must be removed from a Segment before it can be deleted

Initial Segments Setup

During the initial setup of Segments you also have the option to choose whether the Segments will inherit the current app settings for Branding, Home Default, Home and Featured Sites or take on the default 'out-of-the-box' settings. This can only be set once and can not be edited after Segments are enabled.

Initial Segments Setup

To speed up the initial setup of Segments you can use the settings that you already have in place for the following as a starting point for managing each Segment:
- Branding
- Home Default
- Home
- Featured Sites

This option is only available on the initial setup of Segments and will not be made available again when editing. Please note:
- Segments added in the future will automatically use 'out-of-the-box' settings.
- Once enabled these settings will be applied, but from that point they will be managed indepedently for each Segment.

(•) Use organizations current intranet settings

( ) Use out-of-the-box settings (Blank)

Cancel   Enable Segments

After clicking 'Enable Segments' a modal is displayed giving a summary of the choices during the setup process.

Enable Segments

> **Warning**
> Enabling Segments will take some time, during which employees will be locked out of the app. If possible this should be done outside of normal working hours.

Segment setup

Segment method Country
Manage Branding Individually for each Segment

Segments

Segment Name US
Countries US
Total People 6

Segment Name Europe
Countries France, UK
Total People 7

Segment Name Asia
Countries Japan, China
**Total People** 7

Initial Segments setup

Use organizations current intranet settings

Cancel   Confirm & Enable Segments

Once the App Manager has setup all of the Segments, clicking the 'Enable Segments' button will enable Segmentation

During the time that Segments is being Enabled no Users will be able to access the intranet. If possible this should be done outside of normal working hours.

The App Manager will be presented with the "configuring" screen until this is complete, then they will return to **Manage Application > Segments**.

GoodCo Central

GoodCo Central is temporarily unavailable - Segments are being configured
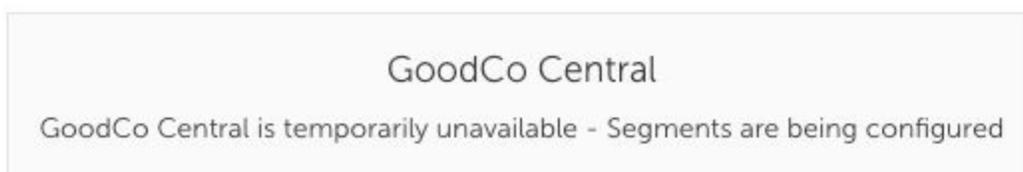
Now that Segments is enabled, this page will show:

- An option to edit the Segments setup
- An option to set whether branding is Segmented or not
- A list of the Segments that have been setup
  - Their Segment Field values
  - Audience count for each Segment
  - The designated Segment Managers
- An option to set the Segment Managers for each Segment
- An option to Disable Segments

Manage Application

Setup   Defaults   People   **Segments**   Integrations   Resets

Segments

✔ **Edit Segments**

Segments allow an organization to provide tailored experiences for different groups of employees. The following can be set for each Segment

- Home Defaults
- Home
- Featured Sites
- Branding (Optional)

Segment method   Country
Manage Branding   Individually for each Segment   Change

Asia

You belong to this Segment

Countries: China, Japan
People: 7
Segment Managers: Add Segment Managers

Launch Segment Bar   Subscriptions

Europe

Countries: UK, France
People: 7
Segment Managers: Add Segment Managers

Launch Segment Bar   Subscriptions

Branding

When Segments are being set up, you will be able to decide whether Branding should apply globally to all employees in the organisation, or whether each Segment will have its own branding that only employees in the Segment will see. It is not possible to create a combination of these options.

When Segments is already enabled

After Segments are enabled it is possible to change the way that Branding is handled by returning to **Manage Application > Segments** and clicking on 'Change' in Manage Branding.

- If you change the option from "Same for all Segments" to "Individually for each Segment": all Segments will now have their own Branding option available to App/Segment Managers. The Branding will reset to the system default settings.

- If you change the option from "Individually for each Segment" to "Same for all Segments": all Segment branding will be deleted and the application-level branding will be reset to the default branding settings.
    - Now only App Managers (and those who have the branding privilege) will be able to manage the application branding.

Managing Branding when it is Segmented

When branding is segmented ("Individually for each Segment"), Segment Managers will see the **Manage > Branding** option in their User Menu and will be able to use it to change the branding for employees in their Segment.

App Managers are also able to manage the Branding for their own Segment via the **Manage > Branding** in their User Menu. They can also manage the Branding for all other Segments using the Manage Segments Bar

Any employee who is NOT a Segment or App Manager but does have the branding privilege will not be able to access the Brand Editor. This privilege is only valid when Branding is not segmented.

Managing Branding when it is NOT Segmented

When branding is NOT segmented ("Same for all Segments") only App Managers and employees with the branding privilege granted will be able to change branding for all employees in the organisation.

Segment Managers will not be able to change branding in any way.

Featured Sites

When Segments is enabled Featured Sites can be set for each Segment. This allows you to highlight certain Sites that are relevant to the Segment, making it easier to guide employees to the right Sites.

- From the Site Index > Featured tab, a Segment Manager or App Manager can configure the Featured Sites for the Segment they belong to.

- They can use drag and drop to arrange the Featured Sites. Changes to the order of the Featured Sites are saved automatically as they are made.

- Sites can be added as Featured Sites by clicking "Add Featured Site" and using the search function to select the correct Site.

- Clicking the 'X' in the top right corner of each Site will remove it from the Featured Sites.

Top tip:

No two Sites within Simpplr can have the same name, even if Segments is enabled. If you are setting up Sites aimed at a particular Segment it may be useful to include the Segment name in the title.

E.g- You have three Segments named Asia, US and Europe. You want each Segment to have a HR Site. It would make sense to name the three Sites "HR- Asia", "HR- US" and "HR- Europe"

(Please note we recommend the use of a Suffix to the Site name rather than a Prefix as it helps with searching)
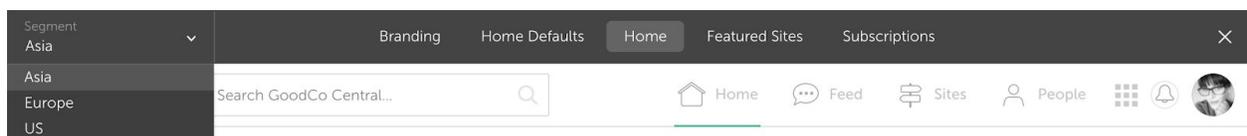
Segments Bar

The Segments Bar allows App Managers to manage Segments that they do not belong to.

This can be found in **User Menu > Launch Segments Bar** or in **Manage Application > Segments** by clicking the 'Manage Segment' button under each Segment
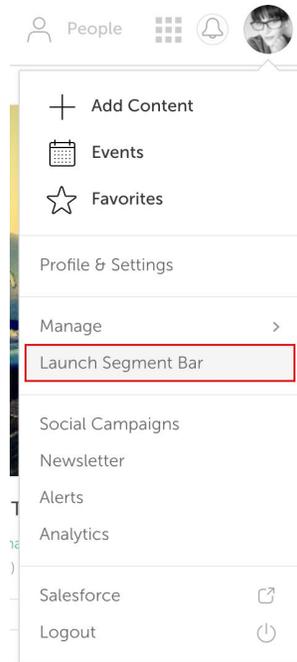
Segment Managers can only manage the Segment that they belong to, however App Managers are able to manage all of the Segments.

The Segments Bar allows them to view and manage the Branding (if this has been set to "Individually for each Segment"), Featured Sites, Home Carousel & Tiles, Home Default and Subscriptions for each different Segment.

- If the App Manager is not on their Home, Site Index, Home Default or Segment Subscription pages when launching the Segments Bar, they will be taken to Home when it opens.

- When initially opened the Segments Bar will be set to the App Manager's own Segment. They can navigate through the different Segments in the drop down menu on the left of the Segments Bar.

- The App Manager can select their own Segment from the Segments Bar. There is no difference in behaviour from them making changes to their own Segment without the Segment Bar open.

- While viewing each different Segment, the App Manager will see the Branding that has been set for that Segment (if Branding has been set to "Individually for each Segment").

- Alerts will not be visible while the Segments Bar is open.

- If the App Manager tries to move to a page other than Home, Home Default, Sites Index or Subscriptions they will be shown a warning that the Segments Bar will close and they will return back to their own Segment.

- While the Segment Bar is open the Branding, Featured Sites, Home, Home Default and Subscriptions can also be accessed through the normal links in the header or User Menu. These will allow the App Manager to edit the Segment that they currently have selected.

Top tip:

When viewing a Segment you don't belong to, the results shown in any 'dynamic' tiles where the results are driven by an algorithm (Latest/Popular Content, Celebrations, etc...) will not be an accurate representation of what the employees within the Segment will actually see as they are driven by the Sites and People you are following.

Disabling Segments

Segments can be Disabled in Manage App > Segments. Once 'Disable Segments' has been clicked, the App Manager will be prompted with a warning that the following will happen if they proceed:-

- All Segments will be deleted - this cannot be undone
- All Segment Managers will have their Segment Manager permission revoked
- All employees will be removed from all Segments

- The following features will be restored to their settings prior to Segments being Enabled::
  - Featured Sites
  - Home Banner
  - Carousel
  - Dashboard
  - Home Default
  - Branding (only if branding was set to be segmented)
- Subscriptions created based on Segments will be deleted, this cannot be undone and the information will not be stored
  - However employees will continue to follow all of the same Sites and People that they followed prior to disabling

Disable Segments ✖

Disabling Segments will DELETE ALL Segments and REMOVE ALL users from Segments.
All Segment Managers will have their Segment Manager permission revoked.
Segment settings will not be stored.

The following features will be restored to their settings prior to Segments being Enabled:

- Featured Sites
- Home Carousel
- Home Dashboard
- Home Defaults Dashboard
- Branding

Segments Subscriptions will be deleted ('Everyone in Organization' Subscriptions will be retained), this cannot be undone and the information will not be stored.
However, users will continue to follow all the same Sites and People that they followed prior to disabling.

This action cannot be undone.

Enter "CONFIRM" here

Cancel   Disable Segments and Delete Data

Segment Managers

As Segments create a greater variety of settings across the intranet the workload in administering these settings also increases. To help with the extra management involved an App Manager has the option to assign any number of Segment Managers to each Segment.

Segment Managers are able to:

- ○ Assign Featured Sites to their Segment
- ○ Create Subscriptions within their Segment
- ○ Manage the Carousel, Dashboard and Home Defaults within their Segment
- ○ Manage the Branding within their Segment (only if branding is set to be segmented)

- Segment Managers must belong to the Segment they are managing, which means they cannot manage more than one Segment.

Segment Managers are not able to:

- Manage any Segments apart from their own.
- Able to define the way Segments are set up.

App Managers	Segment Managers
Enable Segments Define the Segment Field Define the values of each Segment Edit Segments Set Segment Managers Branding for all Segments Set Home Defaults all Segments Featured Sites for all Segments Manage Home for all Segments Create, Edit and Delete Subscriptions for all Segments Disable Segments	Branding for their own Segment Set Home Defaults for their own Segment Manage Home for their own Segment Featured Sites for their own Segment Create, Edit and Delete Subscriptions for their own Segment

Home Management Privileges

As Segment Managers now have the ability to update the Carousel and Home Dashboard for their Segment it is no longer to necessary to also grant Home Management privileges to users.

When Segments is enabled the Home Management section of **Manage Application > Privileges** will be disabled.

Profile Fields

When a new Segment Field value (i.e. a new Division, Company or Country) is created or synced from Salesforce or Workday, employees with the new value will not be able to login until the new value is assigned to a Segment.

This can be avoided by adding the new Segment Field value to a Segment before adding any employees to it. In that way, when the employees' Segment Field value is updated their experience will immediately switch to the correct Segment.

If an employee is moved from one Segment Field to another (for example if they move from one Country to another and their data is updated accordingly) they will be moved to the Segment that is relevant to that Segment Field and inherit all of the settings for that Segment.

Changes to User Menu

New options have been added to the User Menu for both Segment Managers and App Managers.

For Segment Managers:-

- Home Default
  - Navigates to a new Home Default page
- Subscriptions
  - Navigates to new Subscriptions page
- Branding
  - Opens Brand Editor

For App Managers:-

- Launch Segments Bar
  - Opens Segment bar
- Home Default
  - Navigates to new Home Defaults page
- Subscriptions
  - Navigates to new Subscriptions page