

The Jive logo consists of the word "jive" in a lowercase, bold, sans-serif font. The letter "j" has a distinctive hook that extends downwards and to the left.

work better together™

**Jive for Office 365**

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## 8.0 Help for End Users

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## Using Jive for SharePoint Online and O365

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Jive for SharePoint Online and Office 365 lets you synchronize a SharePoint site collection with a Jive group, and also provides the Jive for Office functionality that lets you edit collaboratively and interact with a Jive community from directly within an Office 365 document.

Documents uploaded to SharePoint online, either as uploaded documents to a Jive group or inside a linked folder in OneDrive for Business, will be available for preview in Jive. You can easily move between the Jive site and SharePoint storage, so you can leverage Jive's rich social functionality (with likes, comments, shares, badges and so on) as well as SharePoint's robust document management functionality.

You can also co-author Office 365 files directly from Jive or bring Jive to Office 365, across any device or operating system. Versioning, collaborative editing and social features become available in a side pane when you open your SharePoint-linked documents in Office 365. For more information, see [Using Jive for Office Online](#).

## What Is Jive for SharePoint Online and Office 365?

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Jive for SharePoint Online and office 365 lets you store your files in SharePoint while still making them visible and available for social interaction in Jive. Collaborate socially around your documents, easily search for them in your community, and track their reach and impact. In Jive for SharePoint Online you can:

- Connect Jive groups with SharePoint Online sites, so you can store all binary files uploaded to the Jive Group in the associated SharePoint document library.
- Upload files to SharePoint online through Jive.
- Upload files to SharePoint online and synchronize automatically to make them visible and available in Jive.
- Use the full Jive for Office functionality for collaborative editing and publishing right inside Office.

## Jive for SharePoint Online System Requirements

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Jive for SharePoint Online requires the Jive for Office 365 add-on, plus a current version of Jive.

### Jive Requirements

- Jive 8 or current Cloud version of Jive

### Microsoft Requirements

- Office 365 with SharePoint Online and accounts for all participating users

### Browser Requirements

The following browsers are supported:

- Internet Explorer 9 or higher.
- Current versions of Chrome and Firefox

## Creating a Place Linked to SharePoint Online

To use Jive for SP Online and O365, you need a Jive place linked to a site collection in SharePoint Online. Here's how to create one.

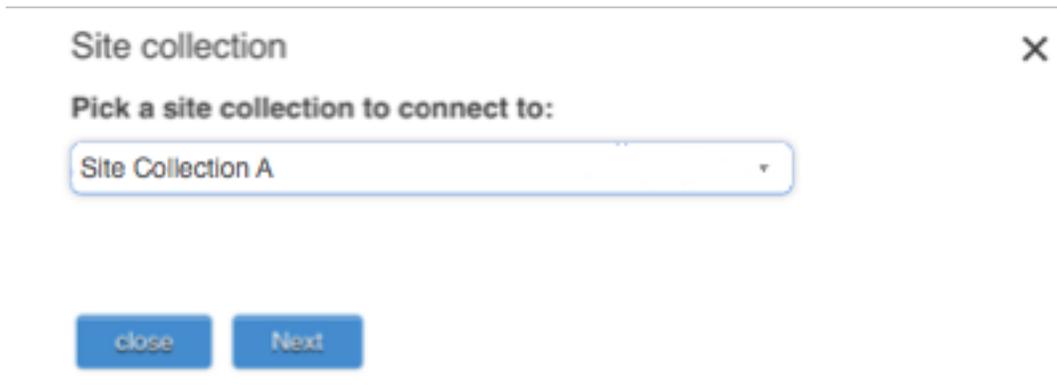


**Note:** If you already connected a Jive place to SharePoint Online, and you need to disconnect them, see [Disconnecting Your Place from SharePoint](#) on page 7.

To create a place that will store all uploaded files in SharePoint Online:

1. Begin creating a place by selecting **Group, Space, or Project** from the create menu and providing basic place settings. Because of permissions complexity, we recommend using a group for most implementations.
2. Choose a place template and select **Preview**.
3. Next to External file storage, click **Change**. You could also select **Manage > Settings > OK** to get to the Place settings page.

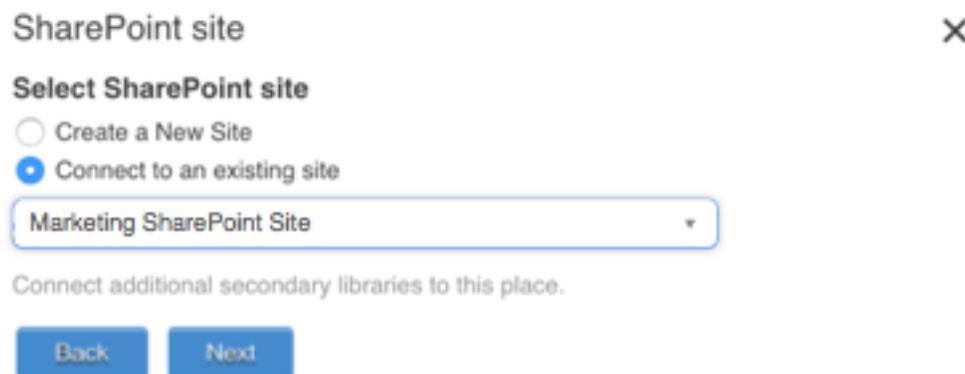
4. Select the name of an Office365 integration in your community. Depending on how your integration was set up, this could be called Office365 or SharePoint, or it could be the name of a specific site collection. If you're not sure, ask your community manager.
5. Click **Apply**. You should see the Site Collection dialog as shown in the following image.



6. Some communities are set up to connect only to new SharePoint sites, and some have the choice of connecting their place to an existing or a new site. You'll know by the buttons you see in your Site Collection dialog:
  - If you see a **Finish** button, select your site collection, then click **Finish > Save**. You've completed this procedure, and your place will connect to a new SharePoint site.
  - If you see a **Next** button, click it. You're allowed to connect to existing or new sites. Proceed with the next step of this procedure.
7. Select a site collection that will be linked to this group, and click **Next**. You will now see the SharePoint Site dialog.
8. Select either to connect to an existing SharePoint site, or create a new one, and Jive will create your SharePoint site for you.

 **Note:** When you connect to an existing site, Jive does not alter the set site permissions.

9. If you selected **Connect to an existing site**, then select the site, and click **Next** as shown in the following image.



- a) Select a document library to store Jive documents . You can select multiple document libraries to connect to this Jive place.

Select document libraries ×

Select document library for Jive docs

Documents ▾

Additional document libraries to connect

Site Assets × Jive Documents × |

Back Finish



**Note:** When you select one or more additional document libraries, all files in those libraries will be synced in batch to the connected Jive place, but files uploaded to Jive will only be synced to the primary library. This may take a while, depending on the size of the libraries.

b) Click **Finish**.

**10.** If you selected **Create a new site**, click **Finish**.

**11.** Click **Save** to create the place. Files uploaded to the place will be stored in a place-linked site in SharePoint Online. (Jive native documents will still be stored in Jive.)

## Disconnecting Your Place from SharePoint

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You can disconnect your place from SharePoint by selecting No external storage from the Settings page.

When you disconnect your place from SharePoint, Jive leaves the external storage files in tact in SharePoint, so they can be repurposed or safely deleted from the storage system. The file objects pointing to the external files are maintained in Jive, including all their social collaboration activities (commenting, liking etc.), and the link to download the file is converted to a permanent link pointing to the last known location of the file in the external storage system.

To disconnect your place:

**1.** From the place, select **Manage > Settings** to get to the Place settings page as shown in the following image.

**Group Features**  
Select which features you want enabled in your group.

Blogs
  Documents
  Discussions
  Polls
  Projects
  External Objects

Events
  Ideas
  Videos

**External file storage**  
Choose where to store files saved in this group.

No external storage - all files will be stored on your community server  
 Office 365 Integration

2. select **No external storage** > **Apply**.

## SharePoint Online How Tos

Jive for SharePoint Online lets you link documents in a SharePoint Online site to a Jive group. You can edit or upload documents from either direction.



**Warning:** Moving files from one Jive-linked site collection to another, or from one SharePoint Online-linked Jive group to another, is not supported.

| Task   | How to   | Notes   |
|--|--|---|
| Create a document in Jive and store it in SharePoint Online.                             | Upload a Word, Excel, or PowerPoint document to a Jive group that's linked to SharePoint Online.           | You'll see the document synchronized in the linked site collection in SharePoint.                           |
| Upload a document to a Jive-linked site collection in SharePoint and surface it in Jive. | Upload your files into the subfolder called Jive Documents.  | You'll see the document show up in the linked Jive group. .   |
| Open an Office 365 document for editing from the Jive preview page                       | Navigate to the document and click <b>Edit this document in Office 365</b> at the top of the preview pane. | If you also have Jive for Office online, you can use Jive social features when editing it in Office online. |

## Office 365 Collaboration How Tos

With Jive for SharePoint Online and Office 365, you have access to real-time, interactive editing of Office docs.



**Note:** Jive for Office 365 collaborative editing will only work for Office documents that reside in a Jive place connected to a SharePoint Online site. Make sure you're logged in to Office365 before you begin, and that you have Jive Anywhere installed in your browser.



**Warning:** Moving files from one Jive-linked site collection to another, or from one SharePoint-linked Jive group to another, is not supported.

| Task  | How to  | Notes   |
|---|---|---|
| Create an Office 365 document that is linked to a Jive community.                       | Upload a Word, Excel, or PowerPoint document to a Jive group that's linked to SharePoint Online. Or, upload the document to a Jive-linked site in SharePoint. (Your files should be located in a folder called Jive Documents.)   | Ask your community manager for the correct locations in Jive and SharePoint Online.   |
| Open an Office 365 document for editing from the Jive preview page                      | Navigate to the document and click <b>Edit this document in Office 365</b> at the top of the preview pane.  | If you're logged into Office 365 and have Jive Anywhere connected to your community, you should see the Jive pane to the right of your document in Office Online. |
| Like, rate, or comment on content linked in Jive, or reply to existing comments.        | When you open a Jive-linked document in Office 365 or SharePoint, the Jive pane on the right lets you interact the same way you do in Jive. (If you are using the desktop version of Office 365, you'll have to install the Jive for Office desktop connector to get this functionality.) | Comments, likes, and ratings will be synced back into the community.  |
| Mark a comment for Action, or give it an outcome badge like Success.                    | Under the comment, select <b>Actions</b> and then the mark you prefer.  |   |
| Compare an Office 365 document with a previous version uploaded by you or another user. | In the Jive pane, click on an earlier version under Versions.   |   |

| Task   | How to  | Notes |
|--|---|-------|
| <p>See who else is working on the document at the same time and collaborate with them.</p> | <p>Under Online Collaborators in the Jive pane, you'll see information about other people who have opened the document and are working in it. You can contact them directly to discuss, or wait till they upload changes and then merge your changes with theirs.</p> |       |

## Using Jive for Outlook Online

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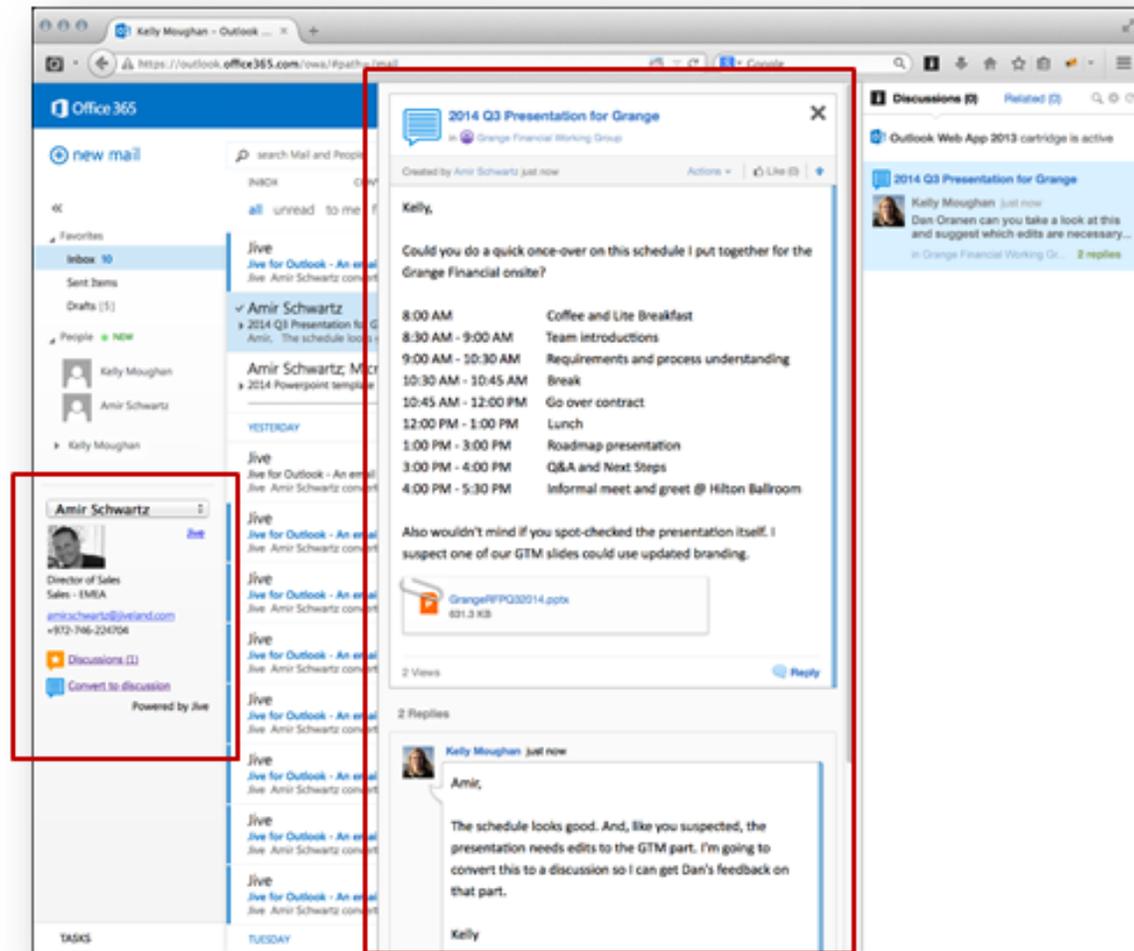
Jive for Outlook Online brings relevant Jive content and conversations into Outlook email threads for easy reference, while providing rich Jive functionality. And because it's all browser-based, you can work across any device and operating system, including Mac.

### What Is Jive for Outlook Online?

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With Jive for Outlook Online, you can:

- View Jive email notifications in the Office 365 Outlook web interface, and take action without leaving Outlook. For example, you can like content, reply to discussions, comment on a documents, mark a reply as a decision, or find related material.
- Convert emails into Jive discussions, including attachments and embedded images.
- View Jive profile information about people you interact with within Outlook.



## Jive for Outlook Online System Requirements

Jive for Outlook Online requires version 2.3 or higher of the Jive Anywhere browser plugin, plus the current version of Jive in the Cloud.

### Jive Requirements

- Jive 7, 8, or current Cloud version of Jive
- Jive Anywhere 2.3 or higher installed on the client browser

### Microsoft Requirements

- Office 365 with accounts for all participating users
- Note that Exchange 2013 with Outlook Web Access 2013 on premise is not supported.

## Browser Requirements

The following browsers are supported:

- Internet Explorer 9 or higher. Internet Explorer 10 or higher is required to upload images and attachments when converting emails to discussions.
- Current versions of Chrome and Firefox



**Note:** Your browser locale must be set to EN.

## Outlook Online How Tos

When you've installed Jive Anywhere with Jive for Outlook Online, it's easy to participate in a Jive community without ever leaving Outlook Online.

| Task   | How to   | Notes   |
|--|--|---|
| Interact with community content from your inbox.                               | Notification emails from Jive content are shown in a Jive-like view that lets you click <b>Comment</b> or <b>Reply</b> , or like any activity. Just click to interact within the email: your interactions will be synced to the community for others to see, and replies will come back to your email inbox.   |   |
| Mark content for Action or as a decision                                       | Click <b>Actions</b> on an item or a comment/reply, and select from the menu.  |   |
| Bring external emails into a community by converting them to Jive discussions. | Select the email and click <b>Convert to Discussion</b> in the Jive pane to the left of the email. You'll be prompted to choose a location for the discussion. If it's enabled in your community, you'll also have the option to upload attachments and images from the conversation. Participants who are members of the community will get a notification that you posted the email as a discussion. | Including attachments and images also requires the Jive for Office Online integration. If you're interested in that option, you can contact your community manager. |

| Task   | How to   | Notes   |
|--|--|---|
| View profile information about participants in an email conversation | In the Jive pane to the left of the email, the email sender or another community member's profile information is displayed. Select a different user from the menu to change the information displayed. All the participants who have a community profile will be selectable. | Only community members will have profile information displayed. Other participants won't be selectable. |