

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™

for Outlook

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8.0 Help for End Users

Release Notes

New in This Release

This new version of Jive for Outlook adds the following functionality:

- The ability to mark Jive content and comments for Action, as a Success, or as a Decision inside Outlook
- The ability to scan and view your custom streams inside Outlook

Using Jive for Outlook

Jive for Outlook lets you interact with your community without leaving Microsoft Outlook email.

In Jive for Outlook, you can:

- View and interact with your streams.
- See and respond to community activity you're notified of in preview mode, including marking items as Final, for Action, Outdated, and so on.
- Create public and private discussions, status updates, and direct messages and post them to your community.
- Convert email discussions into community discussions.
- See profile information and activity from Jive and other social networks for your contacts, as well as community profile information when available.

Client System Requirements

To install the Jive for Outlook program, you'll need the appropriate versions and service packs for Microsoft Outlook and a supported Windows operating system.

Supported Outlook Versions

You can use any of the following Microsoft Outlook versions with Jive for Outlook:

- 2007 with Service Pack 2
- 2010 32-bit
- 2010 64-bit
- 2013 (with version 2.5 and higher of Jive for Outlook)

Supported Operating Systems

The following operating systems are supported. All these require .NET 4.

- Windows XP Professional with Service Pack 2 or higher
- Windows Vista, with Windows Installer 3.1
- Windows 7
- Windows 8

Getting Started with Jive for Outlook

To start getting value out of Jive for Outlook, connect to Jive and other social platforms so you can see what your email contacts are doing around your network. Then try interacting with your Jive community directly from your Outlook inbox.

For a quick Jive for Outlook setup:

1. If you haven't already, install the Outlook client program from your Jive community. You can find the installation link by opening the drop-down menu linked to your name or avatar in the community and selecting **Tools**. Make sure you close any Microsoft Office programs you are running. The installation program will prompt you for any additional installation requirements. More information about installation is available at docs.jivesoftware.com/outlook.

 **Note:** If your device is running an anti-virus software then the downloaded installer files are usually scanned for virus and the installation stalls for some time until the scanning is complete. The installer may even throw an error message that some files required for installation are not available, after sometime the error message goes away and the installation resumes.

2. Specify the correct Jive account if Jive for Outlook hasn't already detected it. If you downloaded the program from the Tools menu in Jive, your Community URL should be supplied automatically.



Jive for Outlook

jive

Enter your community login to connect Jive with Microsoft Office so you can access, share, and update your files.

Community URL:

Check

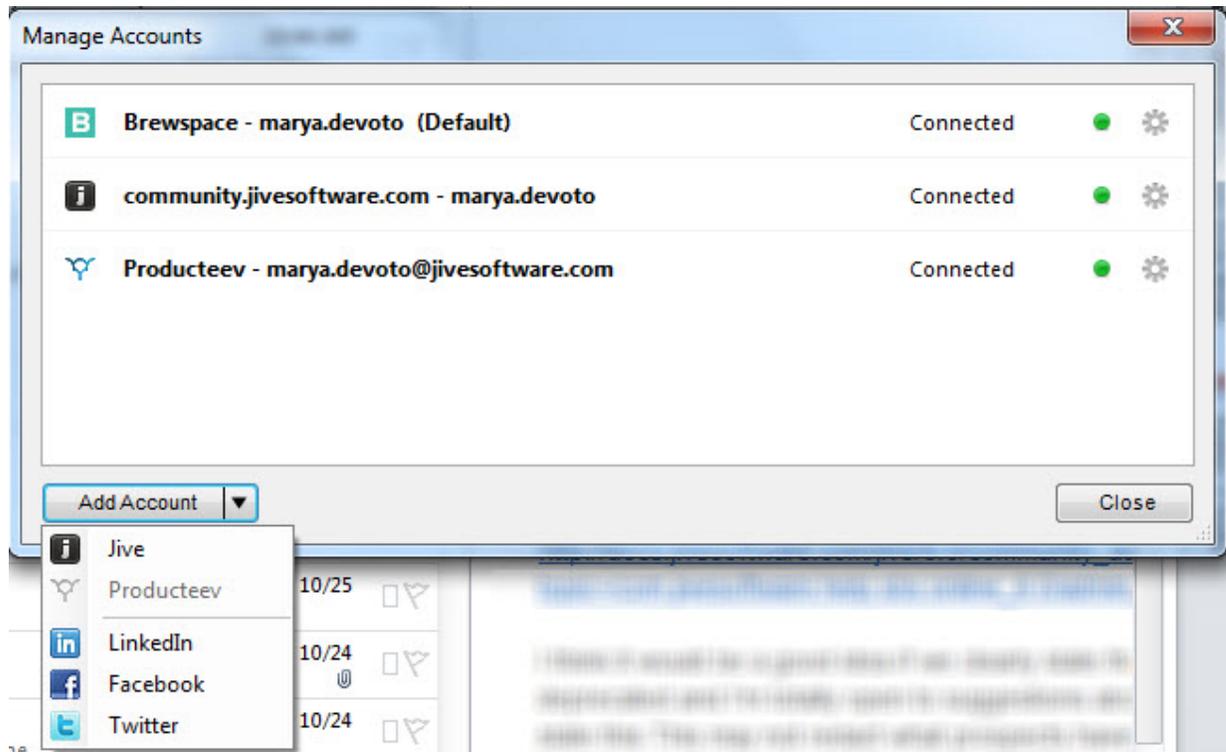
Authentication

Username:

Password:

OK Cancel

3. Connect to any networks you're missing by selecting **Accounts > Add Account**



You should see Jive community posts and other social information about your Outlook correspondents in the right-hand pane. The middle pane shows a preview of any Jive activity you've been notified about in email. You can respond to Jive activity directly from the preview pane by clicking **Reply** or **Comment**.

4. Try posting to your Jive community using the Create menu in the toolbar. An email form will open with instructions for configuring the information you want to post.

Jview and View as email

When you view notification emails from your community or SuperSearch results, you can use Jview to preview and interact with community activity, or you can toggle to email view.

Jview is the default mode for viewing notifications about community activity. In Jview, you can:

- See community pages in a similar format to the way they're displayed on the community.
- Comment on, like, reply to, or share the activity you've been notified of with other community members, without leaving Outlook.
- Stop getting email notifications about something you don't want to get email about. (Just click the gear icon at the top of the pane and select **Stop future notifications**.)
- Access the place where the activity took place by clicking the place name.
- Load information about a contact in the social bar by clicking the contact name.

Double-click a notification email to see it in Jview in a new window.

The following graphic shows a typical discussion in Jview. Note that just as in Jive, Correct and Helpful replies to a question can be marked and are called out visually. You can also mark the top-level and replies as Decision, for Action, and so on.

What are some of the cool new features in the new release of Jive for Outlook?

Correct answer by Mor Avital

Helpful answers: Mor Avital

16 Views Reply

5 comments

Mor Avital 17 minutes ago at 16:08 ★

Threaded discussions, as well as indicators for the current comment and new comments that followed it.

Actions Like (0) Reply

u1 u1 15 minutes ago at 16:10 (in response to Mor Avital)

Those are awesome!

Actions Liked (1) Reply

Mor Avital 14 minutes ago at 16:11 (in response to u1 u1) ★

You can also Like content right from Outlook now, makes it so much easier

Actions Like (0) Reply

If you don't want to use Jview for a notification, click **View as email** to see it formatted like a typical notification email. You can still click through to the community to respond to the activity. If you want to disable this feature permanently, click **Options** and select the **Disable notification emails preview** check box.

Viewing Social Information

Jive for Outlook provides rich social context to your email and lets you customize your view.

When you're using Outlook with the reading pane open, Jive for Outlook gives you the choice of a three-pane view with a maximized "social bar" in its own pane, and a two-pane view with a mini-social bar showing social information in a more collapsed form. Click **Maximize** at the right of the social pane to get the full social bar. Clicking the tiny triangle just to the top left of the user's profile photo gets you the mini-social bar view. (Mini-social bar is not available unless you have the reading pane open.)

The Maximized Social Bar

From the maximized social bar, you can see information from multiple sources about the person whose activity initiated the currently selected email--you can toggle between their contact information, bio, and experience.

- Click the Jive icon to see the full profile in the Jive Community for the selected person.
- Click the menu under the contact's name to select a different person from the currently selected conversation or meeting.

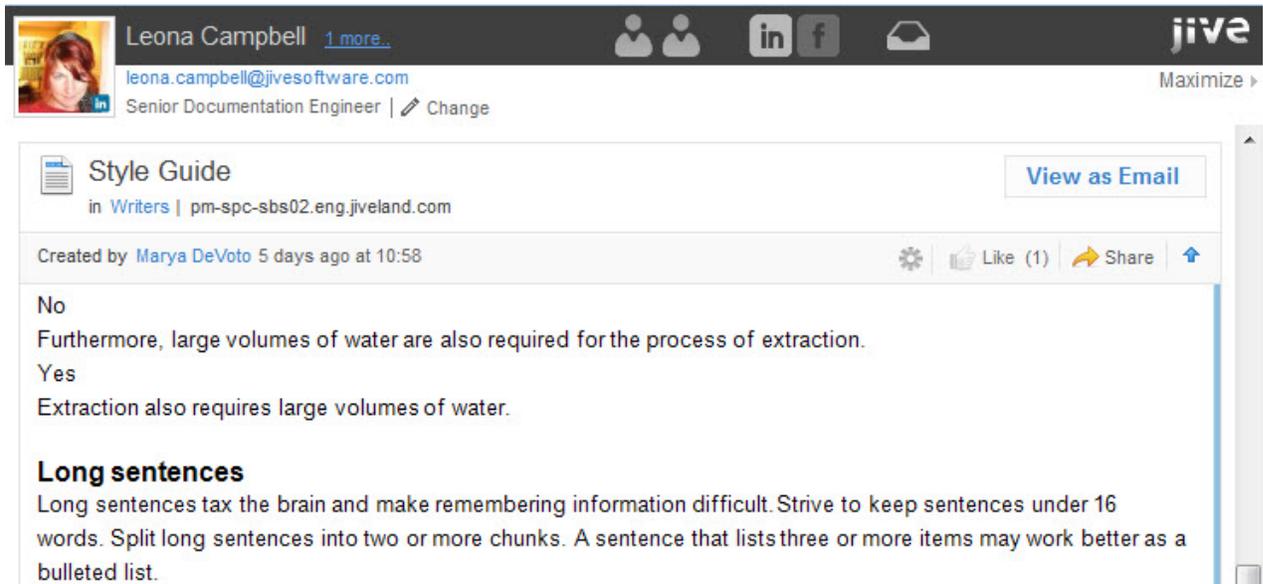
- At the bottom of the social bar, toggle between Jive information, public Facebook and Twitter information (if you're connected to those services), and related Outlook correspondence with the currently selected person. The Outlook tab shows not only emails sent by the person you have selected, but any email threads or meeting requests in which both you and the other person were included.

The screenshot displays the Jive interface. On the left, a document titled "Style Guide" is shown, created by Marya DeVoto 5 days ago at 10:58. The document content includes sections for "Long sentences" and "Short sentences". On the right, the profile of Leona Campbell is displayed, including her contact information (Phone: 503-972-9018, Department: Engineering, Company: Jive Software) and a recent post about "Impact Metrics: New Feature Notification".

The Mini-Social Bar

From the minimized social bar, you won't see the full social information, but you can still see the key profile information associated with any Jive contact. Use the navigation at the top of the right pane to quickly open Jive or any other social networks you're connected to and see information about the contact in context--just click on the appropriate icon. Click the envelope icon to see this contact's email results in Super Search.

Next to the contact name, you can select the arrow to see a list of the other people included in the currently selected conversation or meeting. Click to see information about a different person. You'll also see a Change link under the name. If you're not seeing the right profile information for this contact, you can click this link to search various social networks for the correct profile identity. (See [Finding the Right Person.](#))



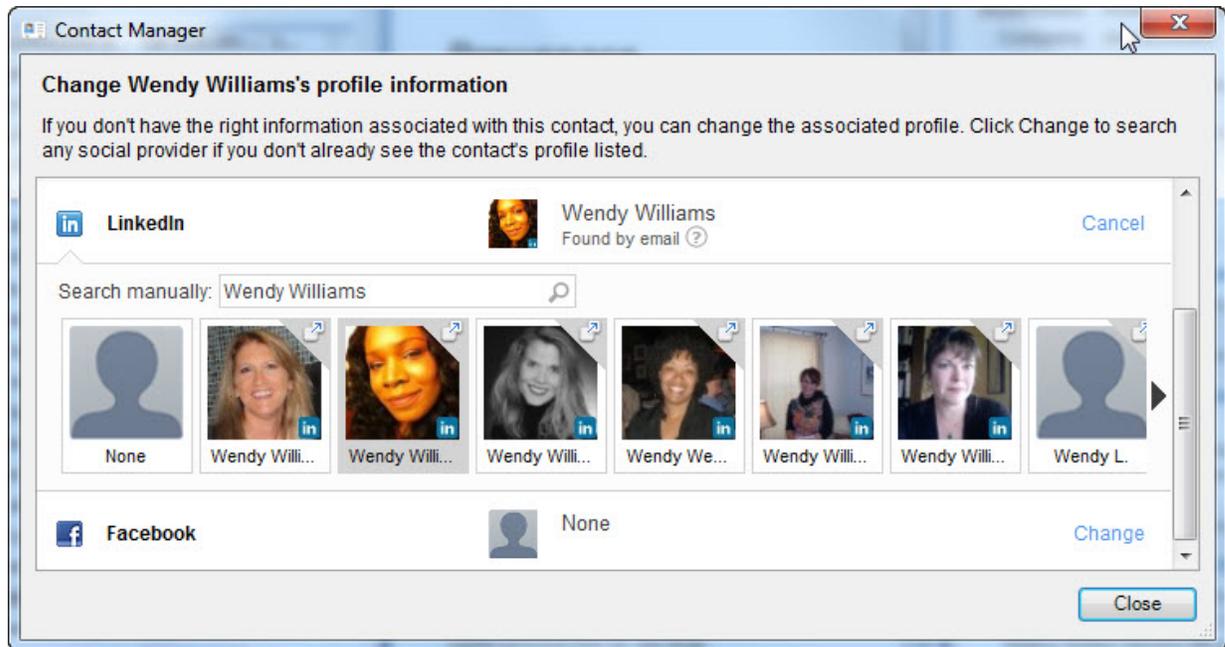
The screenshot shows a Jive social media interface. At the top, there is a header bar with the Jive logo on the right and user information on the left. The user is Leona Campbell, with a profile picture, email address (leona.campbell@jivesoftware.com), and title (Senior Documentation Engineer). There are icons for LinkedIn and Facebook, and a 'Change' link. Below the header, the main content area displays a post titled 'Style Guide' in a document icon. The post is located in the 'Writers' community. It was created by Marya DeVoto 5 days ago at 10:58. The post content includes a 'No' response: 'Furthermore, large volumes of water are also required for the process of extraction.' and a 'Yes' response: 'Extraction also requires large volumes of water.' Below this, there is a section titled 'Long sentences' with the text: 'Long sentences tax the brain and make remembering information difficult. Strive to keep sentences under 16 words. Split long sentences into two or more chunks. A sentence that lists three or more items may work better as a bulleted list.' A 'View as Email' button is visible in the top right of the post area. Interaction icons for settings, like (1), share, and upvote are also present.

Finding the Right Person

To help Jive for Outlook identify the right identity for a contact, use Contact Manager to search.

Sometimes Jive for Outlook has trouble matching up a contact with the correct identity. If you see the wrong person's profile data showing up in JView for one of your contacts, you can use Contact Manager to find the right person. To get started:

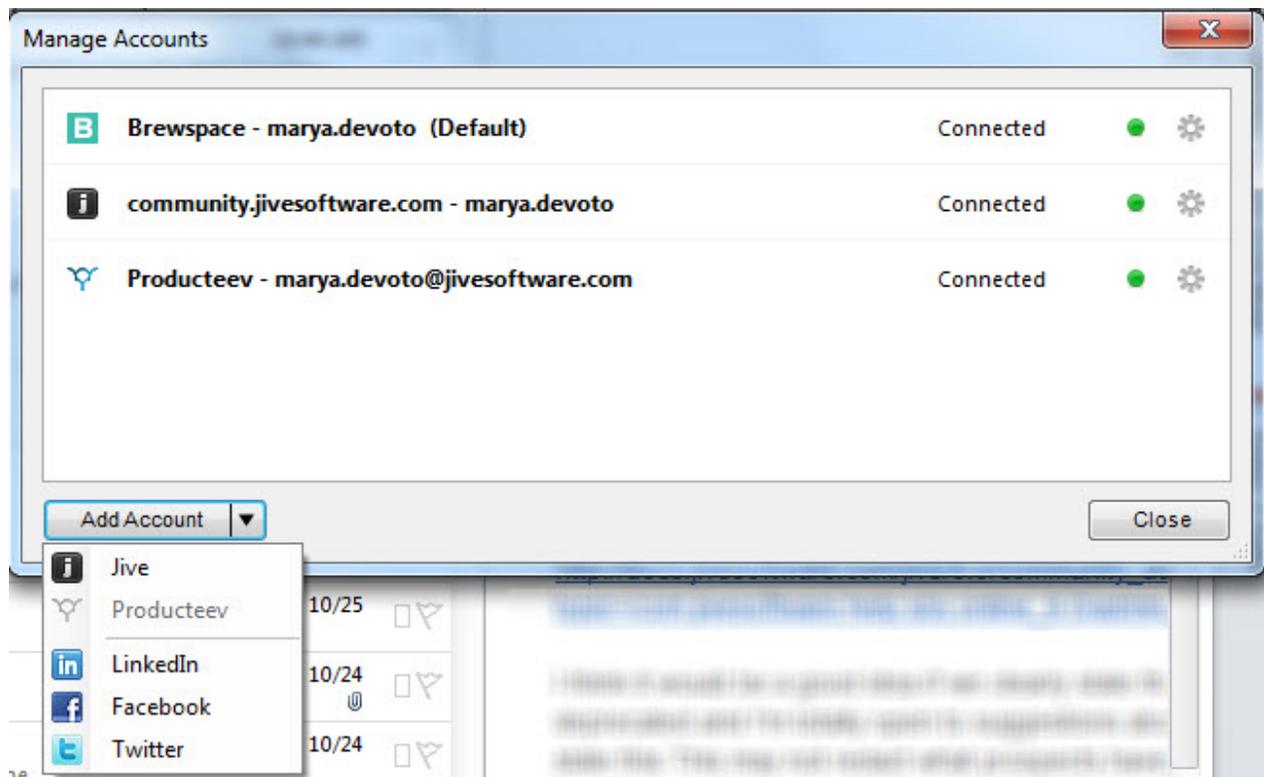
1. In the social pane, click **Change** under the user's avatar.
2. You'll see a list of communities and social providers where you can search for the contact. Select one and click **Change** to try searching for the contact. The results will populate automatically, or you can type a new query in the Search manually field. For example, if you didn't find the right Wendy Williams automatically, Contact Manager lets you pick from other people with the same name. The text under the user avatar tells you how Jive for Outlook matched the contact originally.



Connecting to Jive Communities

You can connect to one or more Jive communities using the **Accounts** settings.

Typically, you'll download the Jive for Outlook client from your community and your connection will be auto-configured. However, you can use the Accounts setting to connect to any community for which you have a valid login, provided it has the server component of Jive for Outlook installed and running. If you receive an error message indicating it isn't, you can ask your community manager to install it.



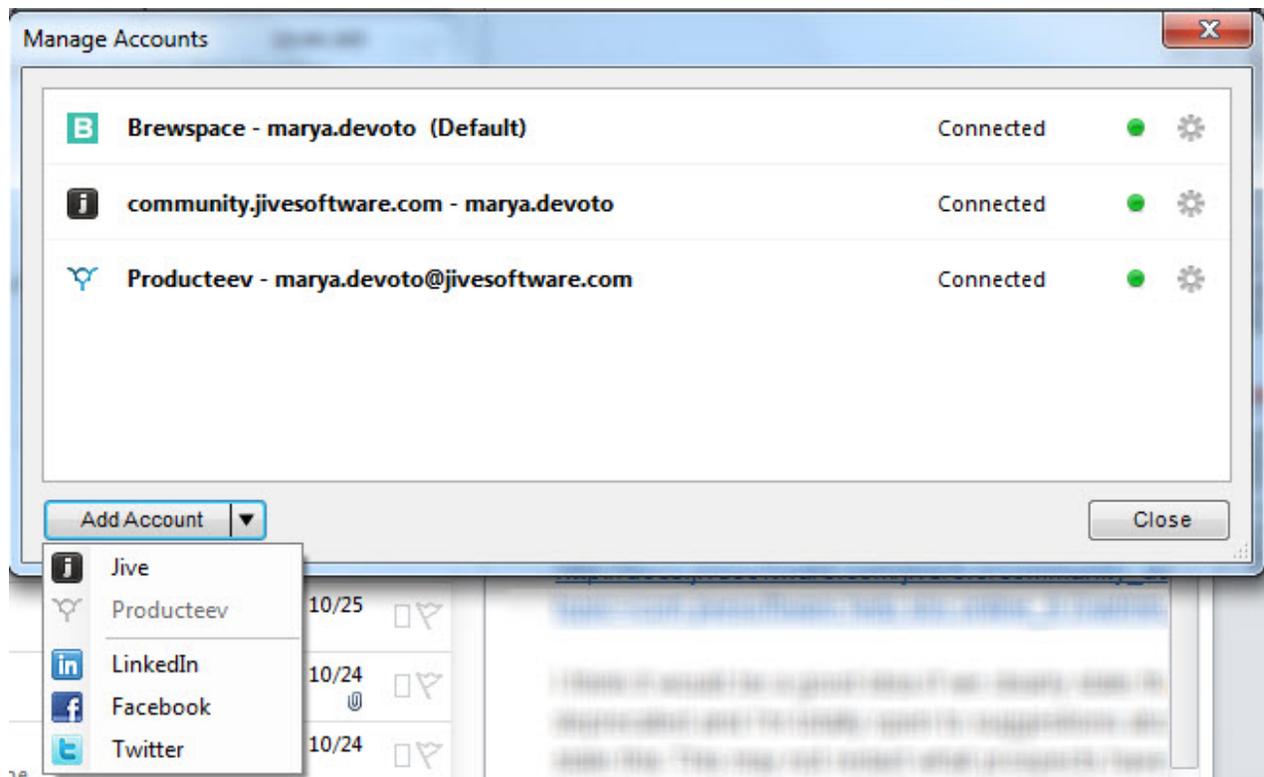
To create and manage account connections:

1. Click **Accounts** on the Jive toolbar.
2. Click **Add Account > Jive** to add a new community connection.
3. If you want to edit or delete an account, or enable and disable it, right-click it or select it and click the gear icon.
4. To change the default Jive account used to connect (when you're connected to multiple Jive communities), right-click a non-default account and click **Set as default**.

Adding External Social Networks

You can enrich the social information provided to Jive for Outlook by connecting it to other social media networks.

If you want to be able to pull in public information about people you exchange email with (including any information you have rights to see on other social networks), use the following steps to connect Jive for Outlook with social networks.



1. Click **Accounts** on the Jive toolbar.
2. Click **Add Account** and select a social network.
3. Provide your account credentials.
4. If you need to edit your credentials or use a different account for that network, select the account and click Remove. Then re-add the account.

Viewing Your Jive Streams in Outlook

You can view and interact with your streams, including your Jive Inbox, right from Outlook.

Just click the Streams button in the Jive toolbar in Outlook. You'll see the Jive community, or communities, you're connected to listed in the drop-down menu. If you have any unread Inbox items, you'll see a number next to the community name in parentheses that indicates the number of unread Inbox items you have.

Once you're in the Streams view, you can switch from one stream to another by clicking the main stream button.



Note that the streams view in Outlook works a little differently than the regular desktop Jive application:

- You can filter your streams by content type *and* participant(s) in Jive for Outlook. So, for example, you could filter your stream so that you see only the @mentions of your boss or the shares from your coworker. (To get back to the unfiltered view, just click **All Items**.)
- Certain notifications will not show up in your Streams in Outlook. These notifications will count towards your unread Inbox items count, but will not be marked as read until you read them from the desktop Jive application. These items include:
 - Notifications that a user has installed an app, a group or project was created, a status level was achieved, or a user's profile was updated
 - Connection updates
 - Latest Acclaim
 - New feature notifications and Welcome to Jive notifications
- Inbox updates are not rolled up in Outlook. If more than one update has been posted to a content item, you'll see each of those updates listed individually in Jive for Outlook. (In the web application, Jive rolls up notifications so that you only see one update listed in your Inbox).

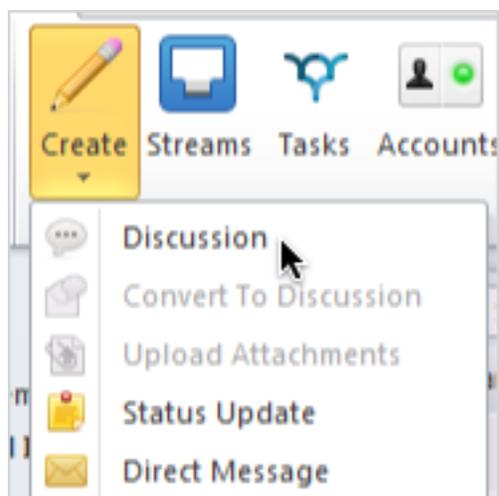
Enabling and Disabling Streams

You can turn streams on and off by clicking **Options** in the Jive section of the toolbar and selecting or clearing **Disable streams feature**.

Posting Discussions to a Jive Community

You can post discussions to your Jive community without leaving Outlook.

1. Click **Create > Discussion** from the Jive toolbar as shown in the example.



2. Click in the **Post to:** field. From here, you can limit the visibility of your discussion by selecting only Specific People, or you can select any space or group, or the entire community. Keep in mind that the permissions on the place where you create the content will determine who can see it and

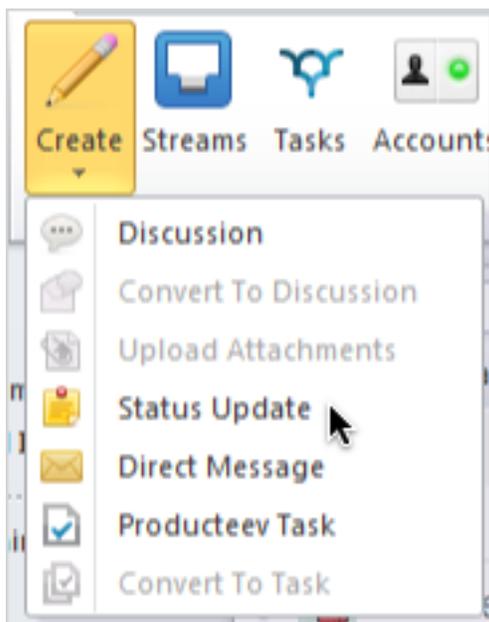
participate. For example, if you post to a private group, only group members can see and respond to the discussion. If you post to a public place, anyone in the community can see it.

3. If you belong to more than one Jive community, you can change the community you're posting to by clicking in the **Post By:** field.
4. In the **Title** field, type a title for the discussion. For example, type "Ideas for upping sales by 500% in March." If you want people to answer a question and be awarded points for correct answers, make the title a question like "Can you think of a way to fix the March sales dip with a social media solution?" and select the **Mark This Discussion As a Question** check box.
5. If you want to alert someone to the discussion directly, click the @ button and start typing the name-- or just type the @ in your discussion. @mentioning sends a notification to the person with a link to the discussion.
6. Click **Post**.

Posting Status Updates to a Jive Community

You can post status updates to your Jive community without leaving Outlook.

1. Click **Create > Status Update** from the Jive toolbar as shown in the example.



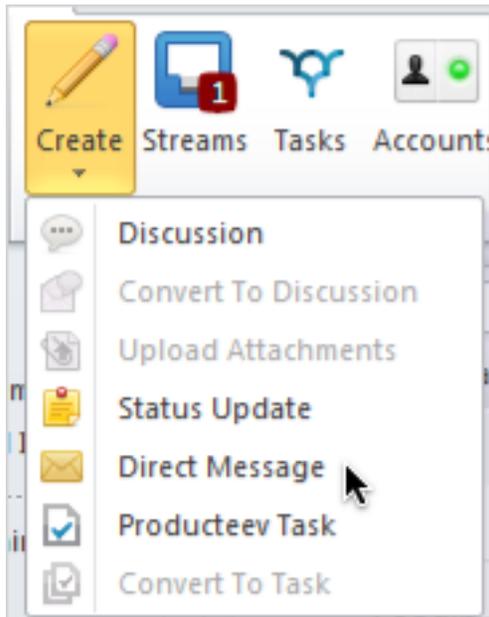
2. Type your status in the window and click **Post**. You can post your status update to a specific group or space in your community, or to the entire community.

Your status will be updated in the community immediately. It may not show up in the Outlook right pane until later.

Sending Direct Messages to Community Users

A direct message is a great way to send one or more people a short and sweet note that won't require a lot of back and forth. You can create a direct message from the Jive menu of Outlook.

1. Click **Create > Direct Message** from the Jive toolbar as shown in the example. Outlook opens a new email window.



2. Type the first letters of the recipient's name in the **To** field to select the recipient.
3. Type the message in the **Message** field.
4. Click **Send**.

Converting Email Threads to Discussions

You can convert an Outlook email thread into a discussion in your Jive community.

Converting an Outlook email thread to a Jive discussion allows you to post the discussion with the initial email subject line as the discussion title, and convert the body of each email into discussion replies. The discussion will be posted in Jive on behalf of the originator of the email thread, using the following syntax: "Posted on behalf of *originator* by *discussion converter* via Jive for Outlook." The discussion originator will also be shown as the author in Jive.

To convert an email thread to a discussion:

1. In Outlook, select an email you want to convert to a Jive discussion. Your discussion will include the email you select plus all the levels above it.
2. Right-click and select **Convert to discussion on Jive**, or click **Convert to Discussion** in the Jive toolbar. A new email window opens. This email window controls the way your discussion will be posted.

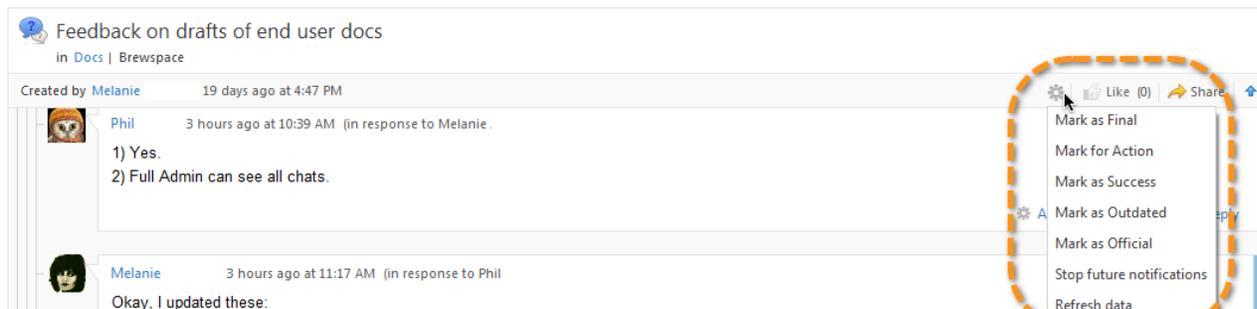
3. The **Post By** field determines the "posted by" value displayed when you post the discussion. (The author of the originating email will be displayed as the author.) If you belong to more than one community, make sure that the correct username is selected.
4. In the **Post To** field, choose where the discussion should be posted. You can limit the visibility of your discussion by selecting only Specific People, or you can select any space or group, or the entire community. Keep in mind that the place where you post the discussion determines who can see and respond to it.
5. If you want the discussion to be tracked as a question and grant status points to people who provide answers, select the **Mark this discussion as a question** check box.
6. If you want participants in the email thread who are not community members to receive an email notification that the thread has been converted to a discussion, select the **Notify external participants** check box.
7. Optionally, add a comment to the discussion by typing it in the message box of the email.

Marking Content in Jive from Outlook

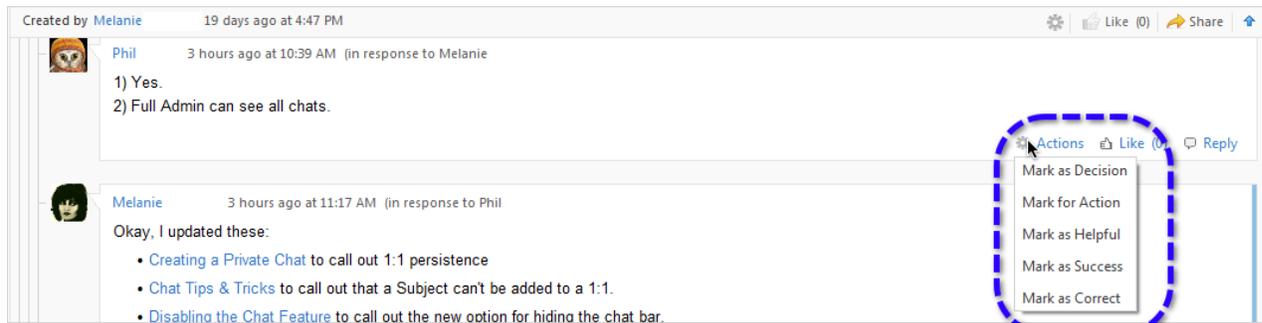
You can mark content as Final, for Action, Outdated, and so on, right from Outlook.

To get started, just click the gear icon on any piece of content in your Jview pane. From the pull-down menu, you'll see the available marking options. To understand how to use each mark, be sure to read the core documentation about this feature [starting here](#).

Here's where to click to mark a top-level item:



Here's where to click to mark a comment or reply:



Jive Super Search

Jive Super Search combines a search of your Outlook mail folders with a search of community content.

When you select the Jive Super Search check box, your search results will include not only Outlook contacts, emails (including deleted email), attachments, and appointments, but also permitted content on your Jive community site. Results are displayed in Jview, so you can interact with your community without ever leaving your search results. You can filter Super Search using the content type buttons at the top of the pane. If you find some of your results are not as expected, click Options and use the **Reindex** button to bring your results up to date. How long it takes depends on how many emails you have saved. You can continue working while indexing takes place. Everything in Outlook is indexed, not just your Inbox.

Disabling Super Search

You can turn Super Search off by clicking **Options** in the Jive section of the toolbar and clicking the **Disable** button.

Enabling and Disabling Jive for Outlook

You can enable and disable the Jive for Outlook functionality from the **Options** dialog.

Some communities may install Jive for Outlook in a disabled state, so you'll need to enable it. If your Jive for Outlook is installed but disabled, look for the **Enable Jive for Outlook** button on your Outlook toolbar. Enabling will restart Outlook with the full Jive toolbar enabled.

To disable Jive for Outlook and show only the **Enable Jive for Outlook** button:

1. Click **Options**.
2. Click **Disable Jive for Outlook**.

Controlling Default Views and Previews

You can change the Jive for Outlook display using the **Options** settings in the Jive toolbar.

You have several options for controlling the default view of your conversations and contacts in Jive for Outlook. By default, you see all messages to and from your contacts in the right-hand Social pane,

including your own responses. You also see your community activity shown in preview mode in the Preview pane. To change these settings:

1. Click **Settings** and look under **General** .
2. To disable preview mode for community notification emails (for example, if discussions are taking too long to load on your computer), select **Disable notification emails preview**.
3. To move the Jive area of the ribbon to the far right, select **Position Jive ribbon group right most**.

Updating to a New Version

When you update to a new version of Jive for Outlook, your account information will be saved, but you may have to provide your credentials one more time to authenticate.

You may be prompted to update to the latest version, or you may be downloading the latest version from the Tools page in your Jive community (select **Tools** in the menu under your name or avatar). Either way, you'll need to restart Outlook, and you may need to provide your community credentials again.

Troubleshooting

If you're having trouble using Jive for Outlook, try these simple troubleshooting tips.

Outlook can't connect to my Jive site

Try accessing your site to make sure it's running. If it is, try going to Accounts and checking that the URL of your Jive site is correct.

My connection is working, but I can't see email notifications in Jview

Try using Internet Explorer 7, 8, or 9. Earlier versions are not supported.