jive

work better together™

for SharePoint 2010/2013

Contents

8.0 Help for End Users

About Jive for SharePoint

Jive for SharePoint combines the secure, robust document management of SharePoint with the collaborative power of Jive.

Get the full benefit of Jive--engage your collaborative team with effortless, non-intrusive change alerting, status updates, direct mentioning, and rich social feedback in a centralized stream, without giving up the document management capabilities of SharePoint.

With Jive for SharePoint, you can move seamlessly between a SharePoint document repository and fully featured social collaboration in Jive. Your Jive groups will store attachments and images in SharePoint. Comment and discuss in SharePoint--your discussion will be surfaced in the Jive activity stream. Keep storing all your uploaded documents securely in SharePoint. And search from either direction to see results from both Jive and SharePoint. It's the best of both worlds.

System Requirements

The following describes the system requirements for installing Jive for SharePoint.

Supported Browsers

- Apple Safari (latest)
- Google Chrome (latest)
- Mozilla Firefox (latest)

Using Jive for SharePoint

Jive for SharePoint makes it easier to use Jive and SharePoint together. It brings the ease of Jive's communication and collaboration into SharePoint without missing a beat! Even when you need to spend your time in SharePoint, you can still be aware of and participate in Jive Place activity.

Overview of Jive for SharePoint

Jive for SharePoint enables you to collaborate on documents and discussions in either SharePoint or Jive.

You can create or upload content when you're in Jive, and interact socially with it in SharePoint. Red arrows point out the web parts in the following image.
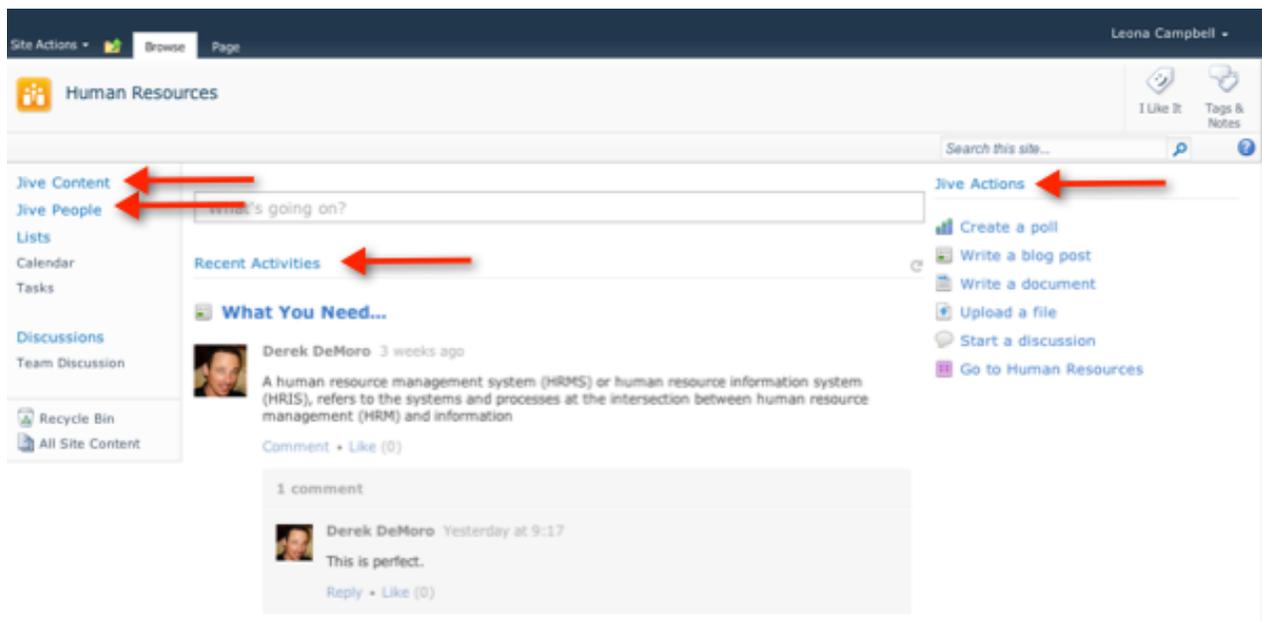
When you're in Jive, you can @mention content like uploaded files and attachments, even though they're stored in SharePoint. If you're confused about where things are, check out Where's My Stuff.

The red arrow in the following image shows you where to access your SharePoint site. For more on accessing the SharePoint site, see Accessing SharePoint from Jive.

Accessing a SharePoint Site from Jive

You can access a SharePoint site from a Jive group or space. In the Actions menu, just click **Go to SharePoint site**.

When the SharePoint site opens, you can take a look at what you can do there.

Jive Web Parts

If your admin has enabled this functionality, you can use SharePoint to interact with Jive documents and discussions.

When you connect your Jive place to a new SharePoint group, the following web parts become available to you:

| **Jive Search Web Part** | In Cloud and Jive 7.0.1 (and higher), this web part can be added to any Search Center, Site Collection or Site that is connected to Jive. This web part enables you to search for documents that have been uploaded to Jive in SharePoint as long as you have permission to see them. |

Jive Actions Web Part	Opens Jive in a new tab to create a poll, write a blog post, write a document, upload a file, start a discussion, or just go directory to the group.
Recent Activity Web Part	Mirrors the group's Recent Activity widget. It shows the latest documents and discussions, along with the latest comments and replies.
People Web Part	Shows identification cards for group members and followers. You can use this web part to get basic user information, including email, status and date joined.
Content Web Part	Shows all content, or just the content type you want to filter by. You can also sort by creation date or latest activity. Clicking the content link opens it for viewing, replying or commenting in SharePoint. You need to edit the Jive content in Jive.

If you connect to an Existing existing SharePoint site, you may want to add the available Jive web parts to your site. For information about adding web parts to your SharePoint site, see Microsoft SharePoint help.

Using the Jive Search Web Part

Once you connect to a SharePoint Site Collection or SharePoint Web Application in Jive, you can add the Search Web Part to any site collection, site, or search center (if you have permission) that is connected to Jive. It enables users to search for Jive documents in SharePoint, if they have permission to see them.

Before you add the Search Web Part to a site collection, sub site, or search center, make sure an Administrator has created a connection for the site collection or web application in the Admin Console. When placing the web part on a site or site collection, the default search results displayed will be those from the connected Jive Place. You can click on **All Results** to see results from your entire Jive instance. When placing the web part in a search center, you will see search results from your entire Jive instance.

To add the Search Web Part to the Home page of your site collection, site, or search center:

1. From the site collection or sub site, click **settings icon** > **Edit page**.
2. Click the **Insert** tab.
3. Navigate to **Jive** > **Jive Search Results** > **Add**. Your Jive Search Web Part should now show up on the Home page of your site collection or sub site.

Where's My Stuff?

Jive for SharePoint stores attachments and uploaded files in SharePoint. Metadata, such as likes, replies, and comments, is stored in Jive, as well as Jive documents and previews.

When you create a place, you can choose how you want it to use SharePoint: Storage Only or Storage Plus Jive.

For security and data integrity, when you upload documents directly into Jive, they are stored in hidden libraries on the SharePoint site. The binaries aren't directly available to a regular SharePoint user. This means, if you have SharePoint Site permission but not Jive permissions, you will not be able to access any Jive documents. It also means Jive for SharePoint can't capture any changes made from SharePoint to these docs so they are only available via the Recent Activity or Jive Content web parts. You can always access these documents via the web parts, and download them directly from there.

Here's what's stored in SharePoint when you have a linked space or group:

- All uploaded files in that place.
- All images in that place.
- All attachments in that place.

Here's what's stored in Jive's shared storage repository:

- All native documents authored in Jive.
- All comments on either Jive or SharePoint documents.
- All Jive discussions, even if they have attached documents.
- Previews (in PDP format) of documents uploaded to SharePoint. The document is in SharePoint: the preview is stored by Jive.

    Note: When searching for SharePoint documents in Jive, remember that where you look depends on when the document was uploaded. Documents uploaded to SharePoint before connecting the Jive group and SharePoint site can be found when you click **Remote Docs** in the Jive group, which is a separate location from all other Jive content. Documents uploaded directly to SharePoint after connecting the Jive group and the SharePoint site can be found by using the Spotlight search or browsing content.

Connecting a New Jive Place to a SharePoint Site

If your admin has enabled this functionality, create a new space or group and connect it to a new or existing SharePoint site. Use the SharePoint site as storage only or storage plus Jive functionality.

To connect your new place to a SharePoint site:

1. Select **Create** > **Group or Space** in Jive.

    Note: Some communities may require community admins to create spaces. You may need a community admin for this step.

2. If you are creating a group, click **Advanced Settings** to show the advanced options.

3. In a group or space, after completing the basic information, select the SharePoint Integration type:

    - None
    - New Site - Storage Only

- New Site - With Jive Functionality
- Existing Site

For more on these choices, see SharePoint Integration Types

4. For New Site - With Jive Functionality and Existing SharePoint sites, you can add remote document activity to your stream by selecting **Remote Documents** and choosing how you want the activity to show up in the stream. For more on these stream setting options, see Remote Document Options.

- Hide in Activity
- Show limited info in Activity
- Show in Activity

5. Click **Create** for a space or **Create Group** for a group.

Connecting an Existing Jive Place to a SharePoint Site

If your admin has enabled this functionality, edit a space or group and connect it to a new or existing SharePoint site. Use the SharePoint site as storage only or storage plus Jive functionality.

To connect your existing place to a SharePoint site:

1. Select **Manage** > **Connect this place to a SharePoint site** from the group or space.

2. Select the SharePoint Integration type:

- None
- New Site - Storage Only
- New Site - With Jive Functionality
- Existing Site

For more on these choices, see SharePoint Integration Types

3. For New Site - With Jive Functionality and Existing SharePoint sites, you can add remote document activity to your stream by selecting **Remote Documents** and choosing how you want the activity to show up in the stream. For more on these stream setting options, see Remote Document Options.

- Hide in Activity
- Show limited info in Activity
- Show in Activity

4. Click **Save**.

Using an Existing SharePoint Site

When you connect a Jive place to an existing SharePoint site, make sure you know the SharePoint URL.

When you link a new place or existing place to a SharePoint site, select **Existing Site** and add the SharePoint site's URL. For example:

```
http://sharepointsiteurl/sites/site_name
```

When you connect to an existing SharePoint site, the existing SharePoint permissions are left in tact. Only a Site Admin can add Jive web parts, which give the site Jive functionality. If you don't add Jive web parts, then you are using the site as storage only. The available Jive web parts are: Jive Content, Jive People, Jive Recent Activity, Jive Search and Jive Actions. For more on these web parts, see Jive Web Parts. For information about adding web parts to your SharePoint site, see Microsoft SharePoint help.

When you link your Jive Place to an existing SharePoint site, user permissions are not synchronized. When a user opens a SharePoint site, they may have different permissions than in Jive. Their Jive permissions do not carry over.

Note: A SharePoint site can only be linked to one Jive Place.

Creating New SharePoint Site

When you choose to connect to a new SharePoint site, Jive will create the site for you and use the permissions established in your Jive Place.

If you choose **Create New Site** or **Storage Only** when creating a place, then Jive foir SharePoint sets the permissions in SharePoint. Jive for SharePoint creates the following three permission sets to manage the users automatically:

- Jive Contributors Users
- Jive Full Control Users
- Jive Read Users

SharePoint recognizes the user who connects the Jive Place to the new SharePoint subsite as the person who created the subsite, so they become the site collection admin. This site collection admin is added to all permission sets becuse Sharepoint requires that a permission set requires at least one user to exist.

Deleting a Jive Place or SharePoint Site

For most SharePoint-connected places you delete in Jive, the SharePoint site is also deleted. The exception is when a Jive Place is connected to an existing SharePoint site.

The best practice for deleting a SharePoint site connected as an existing site to a Jive Place is to first delete the Jive place and then delete the SharePoint site it's connected to. To avoid any broken links, you should delete both the Jive Place and the SharePoint site its connected to.

Deleting a SharePoint-Connected Group

To delete a Jive group:

Select **Manage** > **Delete** from the group you want to delete.

Deleting a SharePoint-Connected Space

You can delete a space by performing the following steps from the Admin Console. Some communities may require the community admin is the one who deletes the space.

To delete a Jive space:

1. From the Admin Console, go to **Spaces** > **Management** > **Summary**.
2. Find the space you want to remove and click **Delete**.
3. Confirm deletion by clicking **Delete**.

Deleting a SharePoint Site

If you want to delete a SharePoint site that was connected to a Jive place as an existing site, make sure you delete the Jive place and then the SharePoint site.

To delete a SharePoint site:

1. Select **Site Actions** > **Site Settings**
2. Select **Delete Site** under Site Settings.

Searching in Jive for SharePoint Content

When you search in Jive, you'll also see results from any SharePoint sites linked to your Jive Community.

You can click the bridged SharePoint site to see the complete search results from SharePoint. You also only see results from SharePoint-enabled connections.

(i) **Note:** The results you see will be limited by your SharePoint permissions as well as your Jive permissions.

Browser Settings to Enable Search

Make sure the following settings are enabled in your browser to enable search to work in Jive:

- All browsers: In order for the search to work your browser must allow Java scripts to run.
- Microsoft Internet Explorer: The SharePoint site must be listed as an trusted site when applying security settings.

Searching in SharePoint for Jive Content

When searching SharePoint sites under Jive-linked site collection, a Jive Search Results tab opens on the search results page. Using this tab enable you to see results from the associated Jive-linked instance.

(i) **Note:** The results you see will be limited by your SharePoint permissions as well as your Jive permissions.

You can also add the Jive Search Web Part to your site collection, site, or to your Search Center (SharePoint Admin only). For more on this, see Using the Jive Search Web Part on page 8.

SharePoint Integration Types

Jive can leverage SharePoint for storage only or for storage plus Jive interactions. If enabled by your admin, when you create a Jive place, you can select how it should correspond to a SharePoint site and whether to create a new site or use an existing one.

When you connect a Jive place to SharePoint, you need to choose the relationship between a Jive place and its corresponding SharePoint site. Jive recognizes SharePoint as either somewhere to store attachments and uploaded files (storage only) or somewhere to store attachments and uploaded files plus share certain Jive social information (Storage plus Jive).

None	This option does not link the Jive place with a SharePoint site. You might need to select this when the default setting links new places to SharePoint sites.
New Site - Storage Only	This *storage only* option creates a new site in SharePoint that is used as a storage provider for Jive. In the Jive Storage Only groups you never see remote docs, remote doc's tab, or the **Go to SP site** link. The Jive admin will see the **Go to SP site** link. From the SharePoint site, you cannot see that Jive links to it.
New Site - Storage + Jive Functionality	This *storage plus Jive* option creates a new site in SharePoint and use a special template in SharePoint to display Jive interactions with content, such as likes, replies, and comments. This template can be changed by the SharePoint admin. The Jive place permissions are mapped and synced to the SharePoint site.
Existing Site	This *storage plus Jive* option links a Jive place to an existing site in SharePoint. The SharePoint site will continue to use its existing template, but the Web Parts will become available in that SharePoint site.

Finding Your SharePoint Docs in Jive

Documents uploaded directly to SharePoint, without using Jive or a Jive web part, can be found by clicking the **Remote Docs** link in the header for the Jive Place. If you set up SharePoint search, you can find these documents by clicking **See all content results** in the Spotlight search, and then clicking your SharePoint site under Bridged Communities. Documents uploaded directly to SharePoint can not be found by browsing Jive content.

> **Note:** When uploading documents to SharePoint, if you see a Content Type option, make sure you select **Document**.

Documents uploaded to SharePoint using Jive or a Jive web part can be found using Spotlight search, or by browsing Jive content.

Remote Document Options

When you connect a Jive place to SharePoint, you need to select how activity for remote (SharePoint) documents should appear in your activity stream.

If your admin has enabled this functionality, then when you create a Jive place, you can select whether remote document actions should be hidden from your activity stream, shown with limited information, or shown with all available information.

> **Note:** The only activity we track is document uploads and updates.

Hide in Activity	Hides all remote document activity from the activity stream. Even if you're following the Jive place, you never see when remote documents are modified or created.
Show limited Info in Activity	Shows some remote document activity in the activity stream, but doesn't use the title of the document. Instead of the document title, you see a generic "Remote Document" title and what action was performed to the document.
Show in Activity	Shows all remote document activity in the activity stream, and includes the title of the remote document.