

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.

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Setting Up Jive for SharePoint Online and Office 365

Contents

Setting Up Jive for SharePoint Online and Office 365.....	5
Jive for SharePoint Online System Requirements.....	5
Jive for SharePoint and Office 365 Architecture.....	5
Jive and SharePoint Permissions.....	6
Setting Up the SharePoint Side.....	9
Setting Up the Office 365 Integration Add-On.....	10
About Jive Webparts.....	12
Installing Jive Webparts App to a Site Collection.....	16
Adding Jive Webparts to Your Site.....	17
Creating a Place Linked to SharePoint Online.....	17
Disconnecting Your Place from SharePoint.....	20

Setting Up Jive for SharePoint Online and Office 365

Setting up the SharePoint Online integration requires configuration on both the SharePoint and Jive sides, starting with SharePoint.

Jive for SharePoint Online System Requirements

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
- Office365 Integration Add-On

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

Jive for SharePoint and Office 365 Architecture

Jive for SharePoint connector's main functionality is connecting a Jive place to a SharePoint site. The following list shows a hierarchy of objects within SharePoint:

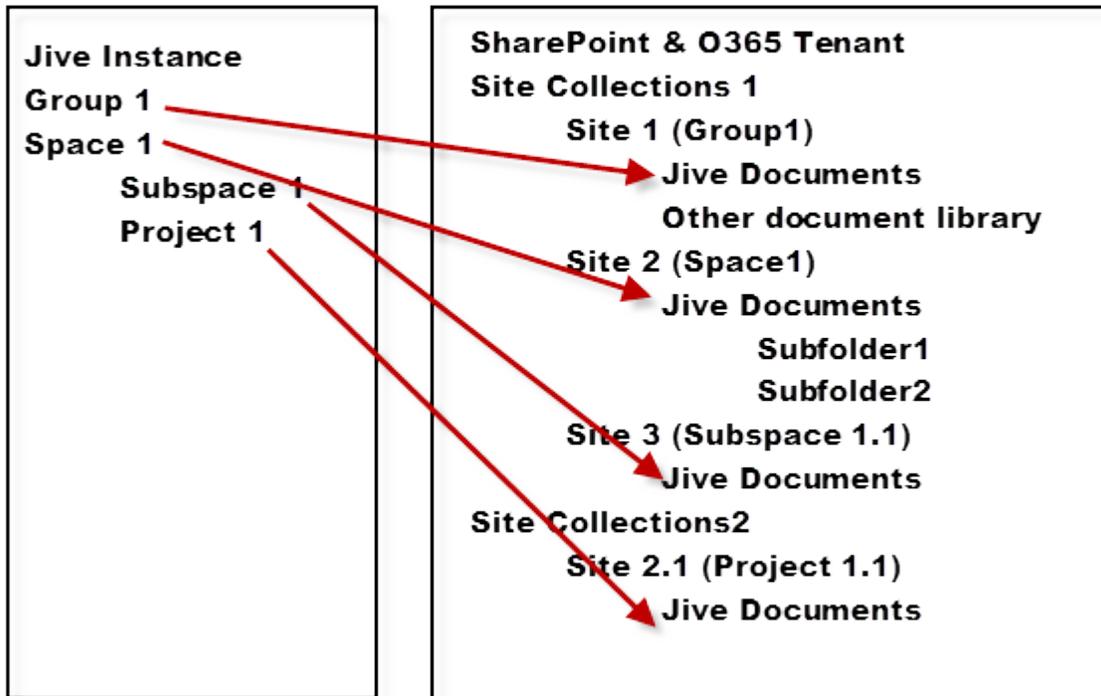
SharePoint Tenant

- Site collection
 - Site
 - Document Library

In Jive, spaces and projects have hierarchical relationships, but groups do not. Any space, group, or project you create in Jive can be mapped to a SharePoint Team site and will automatically contain a document library named Jive Documents, where documents created in Jive will be stored. However, you can modify the hierarchy below the site level (only) on the SharePoint side without disturbing the linkage between the Jive place and the SharePoint site, including both a) adding additional levels of hierarchy under the Jive Documents document library and b) adding other non-Jive-linked libraries that are not stored under Jive Documents. Keep in mind that only files you place in the Jive Documents document library below the level of the Jive-linked site will be synchronized into Jive. Files you create in Jive after you add

hierarchy will continue to be created at the root level of the Jive Documents library, but you can move them into sub-levels under Jive Documents from the SharePoint side and they will continue to be synchronized from both directions.

The following diagram shows an example of more complex linkages between Jive places and SharePoint sites. Note that all Jive places map to the Jive Documents document library under the specific SharePoint site.



Note: Currently, the only supported configuration is a newly created Jive place that automatically creates a SharePoint site in the site collection you specify.

Jive and SharePoint Permissions

Because SharePoint has a different permissions model than Jive, you need to understand the permissions of Jive places in order to correctly set up SharePoint-side permission groups.



Caution: After you set up your Jive and SharePoint connection according to the permissions recommendations described here, be careful about making changes made to permissions outside the automatic provisioning of the system. You should also block regular users from being able to modify the shared permissions of files within Jive-associated document libraries.

When you connect SharePoint to Jive, you're connecting a site collection to a *place*. Jive has three types of places that can be linked to a SharePoint site: groups (sometimes called social groups, to distinguish them from permission groups), spaces, and projects. Groups have a different permissions model from spaces and projects.

Jive Space and Project Permissions

Access to Jive spaces and projects is governed by associating it with a Jive permission group (not to be confused with a social groups, which is a Jive place) There are three types of permission groups in Jive. A single Jive instance may contain all three kinds of permission groups.

- A custom permissions group configured in Jive.
- A custom permissions group provisioned from LDAP or another directory server.
- The built-in Jive groups Everyone and All Registered Users. Everyone includes all users in Jive: All Registered Users excludes external and anonymous users.



Note: Spaces and projects exist in a hierarchy and are subject to permissions that are set in the Jive admin console: spaces and projects inherit their permissions from any space that contains them. For example, if people belonging to the All Registered Users permissions group in Jive have access to a space, they also have access to any subspaces and projects located in that space, unless a permissions override is created. If you create a Jive project or space linked to SharePoint, you may want to make sure it is a restricted space. A project that inherits permissions from an unrestricted space could grant access to every member of the community.

On the SharePoint side, each site created on the Jive side is provisioned with the following three SharePoint permission groups:

- [site name] Jive Contributor Users
- [site name] Jive Full Control Users
- [site name] Jive Read Users

These are used in the following ways depending on the type of permission groups applied on the Jive side.

- For places that grant access to **custom permissions groups created in Jive**, each member of the Jive permission group is assigned to Jive Contributor Users or Jive Read Users according to whether their rights to the space are read/write or read/only rights. The user who created the space is assigned to the Jive Full Control Users group for the linked SharePoint site.
- For Jive places that grant access to **LDAP-provisioned permission groups**, it is assumed that SharePoint is integrated with LDAP and can directly access the same permissions for each user. These permissions are then used to assign rights to the linked SharePoint site.
- For Jive places that grant access to the built-in Jive permissions groups Everyone or All Registered Users (note that this is the default behavior in Jive when creating a space), Jive grants access to the Everyone principal in SharePoint. This principal can be mapped using the Office 365 Integration add-on settings during the Jive-side setup. If the principal is NOT specified in this setup, it will be identical to the default SharePoint Everyone principal. If you need the number of users with access to Jive content to be smaller than the total number of SharePoint users defined in the default Everyone principal, you should map the Everyone principal to a smaller group during add-on setup. For more information about how to do this, see [Setting Up the Office 365 Integration Add-On](#) on page 10.

Jive Group Permissions

Jive groups, also known as social groups, do not exist in a hierarchy or inherit permissions from anywhere else in the community. Instead, access is controlled by the type of group and by group membership. The following table shows who can access the four group types.

	Secret Group	Private Group	Members Only	Open
What's visible to non-members?	None	Group Name Only	All	All
Who can see content?	Member	Member	Anyone	Anyone
Who can participate?	Member	Member	Member	Anyone
Who can invite new members?	Member or Admin	Member or Admin	Member or Admin	Anyone
Who approves new members?	Admin	Admin	n/a	n/a

Other than Open groups, which always grant full access to all members of the community, the other group types have varying membership. The group of people who have permissions changes as people are invited to or leave the group (or are banned from it). SharePoint-side access is synchronized from the group membership. This means that other than SharePoint users with Full Control access, users with group membership on the Jive side have the same rights to the content in the linked site/document library on the SharePoint side. (An exception is that when the Everyone principal is not mapped in the [Office 365 Integration add-on settings](#), users who are not members of or following an Open group will not be able to access content on the SharePoint side.)

Implications of Groups for SharePoint Permissions

- When a restricted (Members Only, Private, or Secret) group is created, users have rights to the content on the SharePoint side according to their Jive-side group membership.
- By default, only people who are members of (or are following) an Open group will have access to content on the SharePoint side. Until users join or are added to the group, Open group content is not visible on the SharePoint side. If this does not reflect your security model, you have the option when [configuring the Office 365 add-on](#) to identify the Everyone principal. Specifying the Everyone principal defines the list of users who have read-write access to Open group content.

- Members of the SharePoint Online Full Control Users group have full rights to all SharePoint-connected places in the Jive community and can also delete content on either side of the integration. Jive group membership does not affect their permissions to content on the SharePoint side.

Jive Group Type	SharePoint Full Control Users	SharePoint Contributor Users	SharePoint Read Users
Open	Group Creator	Everyone*	
Members Only	Jive Admins**, Group Creator	All group members	Everyone*
Private	Jive Admins, Group Creator	All group members	
Secret	Jive Admins, Group Creator	All group members	

*Requires an Everyone principal in SharePoint to be [mapped in the add-on settings](#) during Jive-side setup.

**Requires the Full Control principal in SharePoint to be [mapped in the add-on settings](#) during Jive-side setup.

Restricting Jive Places to Specific Site Collections

When you configure the Office 365 add-on, the best practice is to identify one or more site collections that users can choose from when creating a Jive group, space, or project. (If you identify more than one, place creators select from a drop-down list.) If you do not specify the site collection(s), users are required to specify the URL of a site collection, and there are no restrictions on where the SharePoint content is stored. For most administrators, security considerations will dictate the need to place content in specific site collections.

Setting Up the SharePoint Side

To set up the SharePoint side of Jive for SharePoint Online and Jive for Office 365 Online, you need to create an app catalog, upload the SharePoint-side Jive app, set up a site collection, and then add the app.

The SharePoint Online integration links places in Jive to sites in SharePoint. To create a link between the SharePoint tenant and your Jive site, you'll install an SharePoint-side app that will communicate with a Jive-side add-on. The following overview shows the steps needed to upload and deploy the app, create the site collection, and get the authentication token to set up the Jive side.



Note: These steps are required for both the SharePoint and Office Online integrations. If you are using both integrations, you only have to do them once.

To set up the SharePoint Online side of the integration and make sure you have the information to set up the Jive side:

1. Create an integration user for Jive for Office 365 who has at least Site Collection Administrator access. This user will serve as the service account for the Jive integration. Make sure it is well-secured, because it will need to have access to all the site collections you create as part of the integration.
2. Log in as the integration user you just created.
3. Create an app catalog in the SharePoint Admin Center. An app catalog provides the location where content apps can be published. Full instructions for creating an app catalog can be found in the Microsoft documentation [here](#).
4. On the Apps for SharePoint tab, select **Upload** and upload the SharePoint-side Jive app provided by Jive.
5. Navigate to the SharePoint Admin Center by clicking **Admin > SharePoint** from the top menu bar in Office 365.
6. Create one or more site collections that will contain SharePoint sites that will be linked to Jive places. (Each place you create will have a corresponding site inside the site collection.) It may take a few minutes for your site collection to be live after you create it: if you're looking at the list of URLs, your site is live when the link is live. Note that any site collection created later must grant admin access to the integration user.
7. Create a restricted site collection that will host only the SharePoint-side Jive app. You should select limited storage and Team Site.
8. Go to the URL of the restricted site collection.
9. Click **Site Contents** in the left pane
10. Click **add an app**.
11. Under **Apps you can add**, select the Jive-Office integration app. The settings should allow full control of the site collection and site, and the **Let it have full control of the list:** setting should say Documents. Click **Trust It** to deploy the app.



Warning: The app always inherits the permissions of the service account that last clicked the app. Make sure the integration user you created above is the only user who has access to the site collection that hosts the Jive-Office integration app.

12. Click the app. You'll see a text file (shown below) that includes the authentication token you need to connect your SharePoint site collection to Jive external storage when you configure the Jive-side add-on.

Site collection authorized successfully. Your Jive authorization code for this site collection is **52f13083-b1c7-4214-992d-d56661875b04**

When you have completed this setup you can continue by configuring the Jive for Office365 add-on. You'll use the URLs of your SharePoint site and site collection as well as the authentication token from the app to configure the add-on.

Setting Up the Office 365 Integration Add-On

If you are a Jive Admin, you can install the SP-Online & 365 add-on in Jive so SharePoint Online receives information from Jive using webparts.

Once you install the SP-Online & 365 add-on, the SharePoint Site Collection Admin can refer to [Installing Jive Webparts App to a Site Collection](#) on page 16 so they can install the webparts app.

You need to perform the following steps in Jive to install and configure the SP-Online & 365 add-on.

1. As Jive admin, select **your avatar** > **Add-ons**.
2. Look for the Jive for Office 365 Integration add-on under the Installed tab. If it isn't in that tab, it hasn't been installed yet. Look for it in the Available tab and click **Install** if it is there. If it isn't visible, you may need to contact Support to obtain and upload the package files.
3. Navigate to **Storage Management** > **Add Integration**.
4. Choose **Office 365 Storage Integration**.
5. Provide a name for the integration. This is the name of the external storage users will select when they create a group and choose to connect it to a specific SharePoint site collection.
6. Click **Add**.
7. The Edit Instance Settings dialog opens, but if it doesn't, click **Edit Settings**.
8. Provide the information Jive will use to connect with SharePoint Online:
 - a) In the **SharePoint's tenant root URL** field, type the URL of the SharePoint server. You can find this URL by navigating to one of the sites in SharePoint you're planning to link to Jive, and copy the path up to the first forward slash. For example, if your site is located at `https://mytenant.sharepoint.com/sites/site1/`, type `https://mytenant.sharepoint.com`.
 - b) In the **Jive Connect token for this SharePoint tenant** field, provide the access token that was created using the Jive-Office integration app you installed on the SharePoint side. You can see the token by clicking on the app from the site collection page in SharePoint Online that was created to contain the Jive-linked sites.

 **Warning:** The app inherits the permissions of any user who clicks on the app. Do not click the app unless you are logged into SharePoint online as the Jive-SharePoint integration user as described in [Setting Up the SharePoint Side](#) on page 9.
 - c) (Optional) In the **SharePoint "everyone" user group** field, type the name of the Everyone permissions group in SharePoint. If you specify this group, the users included will have read-write access to all content created in an Open group in Jive, even if they have not been added to the Jive group. This saves admins the work of having to add members to Open group content to grant access on the SharePoint side. (Secret, Private, and Members-Only groups restrict content on both sides of the integration according to the Jive-side group settings, regardless of whether you supply Everyone information here.) See [Jive and SharePoint Permissions](#) on page 6 for more information.
 - d) (Optional) In the **SharePoint "full control (admins)"** user group field, type the name of the Full Control admins permissions group in SharePoint. This group will have access to all SharePoint-connected groups in Jive. The best practice is to create a restricted group of admins in this principal who will be able to access all the Jive places and Jive-linked site collections. See [Jive and SharePoint Permissions](#) on page 6 for more information.

e) If you want users creating a place to be restricted to specific site collections, click the **+** sign under **Site collections list available for creating places** and type the location of a site collection. You can add more site collections by clicking **+** again. Users can choose from the list of site collections when creating a group. Note that as the user configuring the add-on, you must have access to these site collections, or you won't be able to complete the configuration and will see a configuration error.



Caution: Specifying at least one site collection is the best practice, because it limits the SharePoint locations where place creators can create sites, and also prevents errors in specifying a URL. If you specify one or more locations, users are not prompted to supply the URL of a site collection.

9. Click **Validate Authorization**.

10. Your storage instance is now connected. Click **Save Changes**.

When users create new groups in your community, they will now be able to select the integration you just created as the external storage location. For each connected group, Jive creates a new site under the site collection URL you specified.

About Jive Webparts

The Jive People, Jive Content, and Jive Activity webparts are available in SharePoint when you install the Webparts App in SharePoint and install the SP-Online & 365 add-on in Jive.

Jive People Webpart

The People webpart enables SharePoint users to browse the list of active users in the connected Jive place. Info cards are provided for either members or followers of the Jive place. SharePoint users can navigate to the full profile page of the user in Jive.

This webpart can be used in the following ways:

- To see who owns the connected Jive place, use the **Owned By** field.
- To see who can view the content for this webpart, check the **Visibility** field. This changes according to the type of the connected Jive place: open, member only, private, or secret.
- To learn which users follow this Jive-connected place, click **Followers**. You can tell which users only use Jive, and not SharePoint. You can click a user's avatar to open their Jive profile in a new tab.
- To learn which users have joined the connected Jive place or which ones just follow it, click **Members**.

The screenshot displays the Office 365 'People' webpart interface. At the top, there's a navigation bar with 'Office 365' and 'Sites'. Below it, a 'Browse Page' section is visible. The main content area is titled 'People' and includes a 'Home' button and an 'EDIT LINKS' option. On the left, a navigation pane lists various site components, with 'Jive People' highlighted. The central section, 'Jive people', shows ownership by 'ud 1' and a visibility setting of 'Everyone can view the content of this place.' Below this, there are two tabs: 'Followers' and 'Members'. Five profile cards are displayed, each featuring a photo and a job title: Austen Rustrum (Director, PS Engineering), Aaron Bailly (Professional Services Engineer), Tom Resing (Systems Engineer), Dov Amir (Staff Engineer), and Yoav Derazon (Sr. Director, Product Management).

Jive Content Webpart

The Jive Content webpart creates a view of all content items stored in the connected Jive place, including Documents, Blog posts, Discussions and Polls. SharePoint users can click on any content item, view the discussion thread associated with it, and interact with it, such as liking or posting comments. In the context of a given content item, SharePoint users can also navigate to the Jive content page for any further actions.

This webpart can be used in the following ways:

- To view all content types, use the All Content view. You can also narrow the view to a specific content type.
- To change sort order, select Sort by date created or Sort by titles.
- To find out a content item title, author, and latest activity, look at its row in the table.
- To open a content item in a new dialog, click the content title.

The screenshot shows the Office 365 interface for a Jive Content webpart. At the top, there's a navigation bar with 'Office 365' and 'Sites'. Below that, a search bar and navigation options like 'SHARE', 'FOLLOW', and 'EDIT' are present. The main content area is titled 'Jive Content' and includes a navigation menu on the left with items like 'Home', 'Notebook', 'Documents', 'Jive Content', 'Jive People', 'Jive Documents', 'Site Contents', and 'Recycle Bin'. The main content area displays a list of items under the heading 'Jive content', including 'SharePoint Deep Dive', 'test', and 'box_Same1.docx'. A search bar and sorting options are also visible.

Title	Author	Latest activity
SharePoint Deep Dive	Dov Amir	4 minutes ago
test	Dov Amir	Yesterday at 1:33
box_Same1.docx	Dov Amir	Yesterday at 1:33

The Jive Content webpart also shows the following dialog for content when you click its title.

This dialog can be used in the following ways:

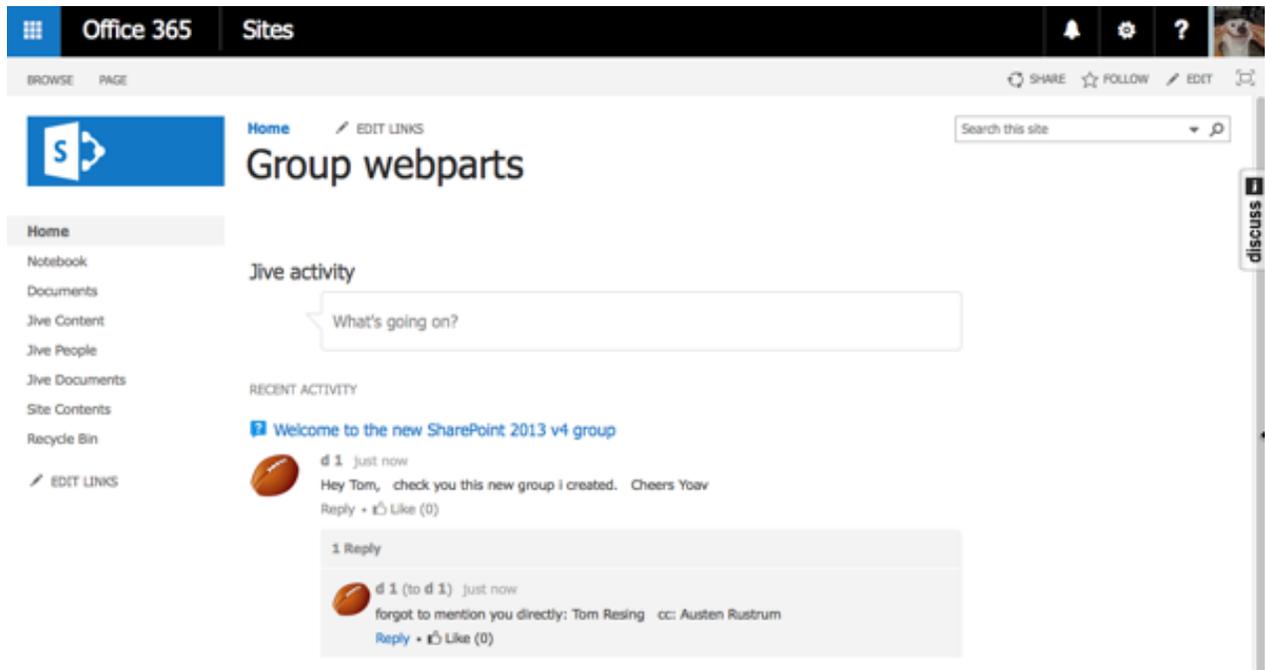
- To open the content in a new Jive tab, click the title.
- To add actions to the content item (or to comments and replies), select **Mark for action**, **Mark as success**, **Decision**, or **Helpful**.
- To add comments and replies, click **Comment** or **Reply**. Click **like** for a comment, reply, or the content item itself.
- To view uploaded and attached files for blogs, discussions, and documents, click the file. You can download it from there.

Jive Activity Webpart

The Activity Webpart is a view of all activity occurring in the connected Jive place, including all content types and social actions. It resembles the activity page that is typically the default page of a Jive place. As with the Content Webpart, the items of the Activity Webpart can be viewed in detail, allowing to post comments and apply social actions, as well as navigate to the full page of the associated item.

This webpart can be used in the following ways:

- To create a new discussion in Jive, type in the "What's going on?" line. Whatever you write will appear in the title of the discussion.
- To reply to comments or content items, click like for the item or the comment.
- To open content item in a new Jive tab, click it.
- To open profiles in new Jive tabs, click usernames for the content creator or users who have replied.



Installing Jive Webparts App to a Site Collection

If you are a Site Collection Admin, you can install the Jive Webparts App to a site collection in SharePoint, making webparts available to the sites in that collection.

You need to install the Jive Webparts App into the app catalog for your SharePoint Site Collection if you want to site admins to be able to add the Jive People, Jive Content, and Jive Activity webparts to their SharePoint sites. After installing this app, make sure the Jive Admin has [installed the add-on](#) and the Site Admin [adds the Jive webparts](#).

To install the webparts app:

1. Go to the SharePoint Site, <https://jiveland.sharepoint.com/>, and press the



in the top left of the screen and then click



2. Navigate to the SharePoint Admin Center by clicking **Admin > SharePoint** from the top menu bar.
3. Click **apps > App Catalog**.
4. Select **Apps for SharePoint**.
5. Click **Upload** and upload the unzipped webparts app.

Adding Jive Webparts to Your Site

The Jive People, Jive Content, and Jive Activity webparts can be added to your SharePoint site once a Site Collection admin has installed the Webparts App to the site collection in SharePoint.

Adding Webparts to Your SharePoint Site

The following procedure provides the basic steps for adding webparts to your SharePoint site.

1. Create a group with a user who is mapped to Jive and SharePoint. You can identify users who are mapped to both places because they have the same email address in Jive and SharePoint.
2. Navigate to the SharePoint site signed in as a SC admin or a user with full control permissions.
3. Navigate to **Sites Content > New > app > webparts app**. Installation will take about a minute.
4. Once installed navigate to the site's Home page, and then click **Edit**. A new page opens.
5. Click **Insert > Web parts** and add the three webparts: Jive people, Jive activity, Jive content.
6. Click **Save**.
7. To verify the webparts are working correctly, log out as Admin, and back into SharePoint with a user mapped to Jive and SharePoint.
8. Look for content in the Jive webparts.



Note: To learn more about these new Jive webparts, see [About Jive Webparts](#) on page 12.

Creating a Place Linked to SharePoint Online

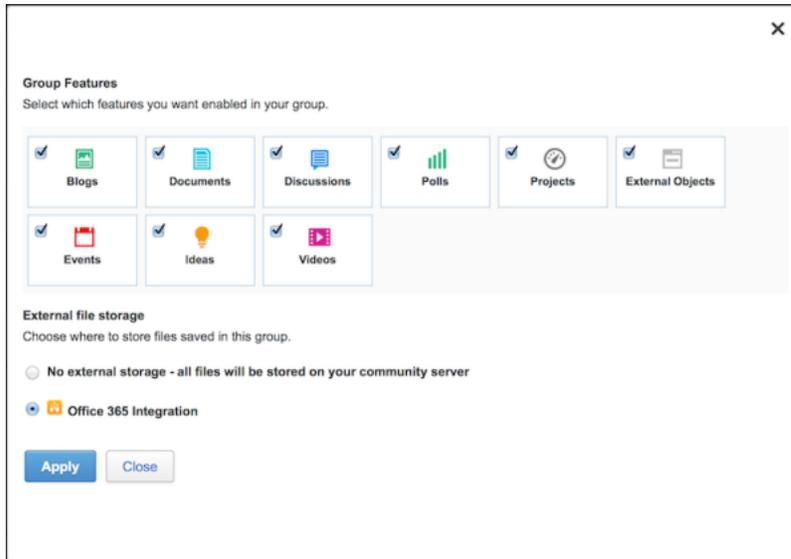
To use Jive for SP Online and O365, you need a Jive place linked to a site collection in SharePoint Online. Here's how to create one.



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 20.

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.
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.

SharePoint site X

Select SharePoint site

Create a New Site

Connect to an existing site

Marketing SharePoint Site ▼

Connect additional secondary libraries to this place.

Back Next

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

Select document libraries X

Select document library for Jive docs

Documents ▼

Additional document libraries to connect

Site Assets X Jive Documents X |

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.)

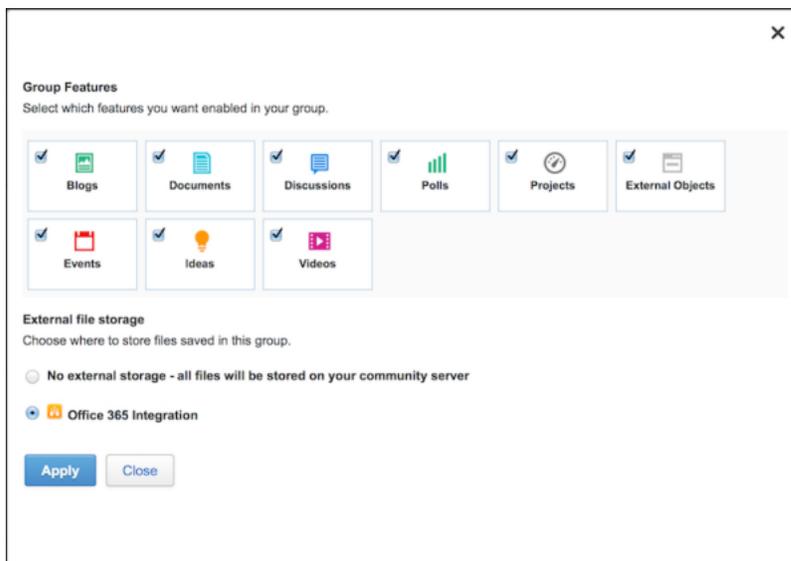
Disconnecting Your Place from SharePoint

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.



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