

Jive Interactive Intranet

## 9.x User Guide

Jive for Office

# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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# Aurea global support

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If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please, try to:

- Search the articles on the [Aurea Knowledge Base](#) for solutions to your issues.
- Search the product documentation and other product-related information that are also available on [Support Central](#).

If you still cannot find a solution, open a ticket on [Aurea Support Central](#). Information about the support organization is available on [Support Portal](#) as well.

You can also find the setup files on [Support Portal](#).

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our [website](#).

# 1

## Jive for Office

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Jive for Office is an add-in for Microsoft Office that enables you to store documents in the community and allows multiple users to edit the same document simultaneously in Microsoft Office. Documents stay in sync because Jive for Office notifies you when changes have been made to the document, and you can choose how you want to deal with the changes.

You get real-time notifications of changes and comments being made to a document when you have it open in supported versions of Office. If someone else has changed the document, you also get the chance to merge your changes with other people's. You can incorporate changes into your document, or overwrite your document with the updated document.

You can also keep up-to-date on comments, ratings, and likings.

*Jive for Office allows you to use the Microsoft Office applications to create documents and have them saved to Jive, where they can be shared with other users for editing (including simultaneous co-editing) and commenting.*

For details, see the following topics:

- [System requirements](#)
- [Supported browsers](#)

## System requirements

*To install Jive for Office, you need the appropriate versions and service packs for Microsoft Office and a supported Windows operating system.*

### Hardware requirements

Jive for Office requires the same hardware as the running version of Microsoft Office, plus at least 40 MB of free disk space.

### Supported Microsoft Office versions

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

- 2010
- 2013
- 2016

Jive for Office supports both 32-bit and 64-bit versions. The bitness of Microsoft Outlook determines the bitness of Jive for Office installed on the machine.

Currently, Jive for Office is available only for Microsoft Windows.

### Supported operating systems and additional requirements

The following operating systems are supported:

- Windows XP Professional with Service Pack 2 or higher
- Windows Vista, with Windows Installer 3.1
- Windows 7
- Windows 8
- Windows 10

Additionally, Jive for Office requires the following to work correctly:

- Microsoft .NET Framework 4
- The supported version of Internet Explorer, refer to [Supported browsers](#) on page 7 for list of supported browsers.

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**Note:** When you login into a community from the application, Jive for Office uses the Internet Explorer version installed on the machine, and an alternative browser cannot be used.

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## Supported browsers

Jive works with most current web browsers. Note that if you need to use Content Editor features, such as cut and paste, script access to the clipboard must be enabled.

- Microsoft Edge\* (Chromium-based).
- Apple Safari 8 and 9 (on Macs only).
- Mobile Safari on iPhone and iPad for iOS 8 and 9 and later. (For a browser-independent native iOS phone app, be sure to look for the Jive Daily Hosted app, if your community uses it, in the App Store.)
- Mobile Chrome on Android devices for Android 4.4 and later. (For a browser-independent native Android phone app, be sure to look for the Jive Daily Hosted app, if your community uses it, in Google Play.)
- Mozilla Firefox\*.
- Google Chrome\*.

\* Google Chrome, Mozilla Firefox, and Microsoft Edge browsers are released frequently. Jive Software makes every effort to test and support the latest version.

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**Note:** The recommended minimum screen resolution for desktop devices is 1024 x 768. Results may vary if you use zoom to adjust your view to levels other than 100%.

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### **Important notes and restrictions**

- Beta versions of web browsers are not supported, but they are quickly added to the supported list after they're formally released.
- Apps are not supported on mobile devices. These features may not work correctly on mobile devices.

# 2

## Using Jive for Office

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*Jive for Office allows you to use the Microsoft Office applications to create documents and have them saved to Jive, where they can be shared with other users for editing (including simultaneous co-editing) and commenting.*

For details, see the following topics:

- [Working with shared office documents](#)
- [Getting Jive for Office add-on](#)
- [Connecting to your community](#)
- [Adding documents to community](#)
- [Copying existing documents](#)
- [Keeping documents synchronized](#)
- [Opening documents from community](#)
- [Working with document versions](#)
- [Adding comments](#)
- [Managing collaborators](#)
- [Sharing documents with other users](#)
- [Disconnecting documents from community](#)

### Working with shared office documents

*With Jive for Office, you can share your Microsoft Office documents with others in your online community.*

*As you make changes to a shared document on your computer, Jive for Office synchronizes the document with the version that's visible in the community and provides real-time notifications to users working in the same document.*

*The notifications tell users that content has changed and give them the option to incorporate the changes into their version using a merge tool. This keeps the content on the community up to date but also synchronizes comments, tags, and collaboration settings between the community and your document.*

This feature is supported for Microsoft Office running on Windows. For more information about supported Office versions, see [System requirements](#) on page 6 in this guide.

If you have the appropriate permissions, you can edit everything but the content of a shared document in the community. In the community, you can edit descriptions, tags, and categories, and you can use an Office program to edit the document content.

### What you can do

With Jive for Office, you can upload Microsoft Office documents to your community, then keep changes to the document in sync while you work in Office.

In particular, with Jive for Office you can:

- Upload Office documents to your community without leaving Microsoft Office. When you upload a document, the community displays a preview of the document. However, the document must still be edited by using Microsoft Office.
- Use Jive in the Office toolbar ribbon to:
  - Change collaboration options to indicate who can edit the document in the community.
  - Create a document for your community.
  - View the currently published version of your local document in your community.
  - Share your document with others.
  - Check for updates to the document.
- Use the Dashboard to:
  - See who else is editing the document.
  - See how many people viewed the document, who created it, and who's contributed to it.
  - View, add, delete, and reply to comments.
  - View and add tags to help categorize the document in the community.
  - Edit the document's description.
  - View older versions of the document.
  - Rate the document and see how others rate it.
  - Browse files similar to the open file.
  - Take a look at more files created by the author.

## Getting Jive for Office add-on

*You need the Jive for Office add-on to share documents between Microsoft Office applications and your community, which requires Microsoft Windows. If you don't have the add-on, you can get it from*

**Tools** under your avatar.

To get the Jive for Office from **Tools**:

1. In the community, go to **Your avatar > Tools** .
2. Find the **Jive for Office** add-on and click **Download now**.
3. Close any Microsoft Office programs you are running.
4. Run the file after it is downloaded to install the add-on.

The installation program will prompt you for any additional installation requirements.

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**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.

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After you install the Jive for Office add-on, you need to connect it to your community, as described in [Connecting to your community](#) on page 11.

## Connecting to your community

After you first install Jive for Office, it might not be completely set up to connect to the community you want to synchronize documents with. To connect, you need to provide your user name and password.

To get connected to your community:

1. Open a Microsoft Office application.
2. On the ribbon, go to the **Jive** tab.
3. In **Other**, click **Accounts**.
4. Click **Add** to add your Jive account.
5. Enter the **Community URL**, which is the exact URL that you use to navigate and login to your community.
6. Enter your Jive user name and password.
7. Click **Log in**.

Jive for Office verifies your credentials and logs you in. Now that you connected to your community, you can add documents to the community. For more information, see [Adding documents to community](#) on page 12.

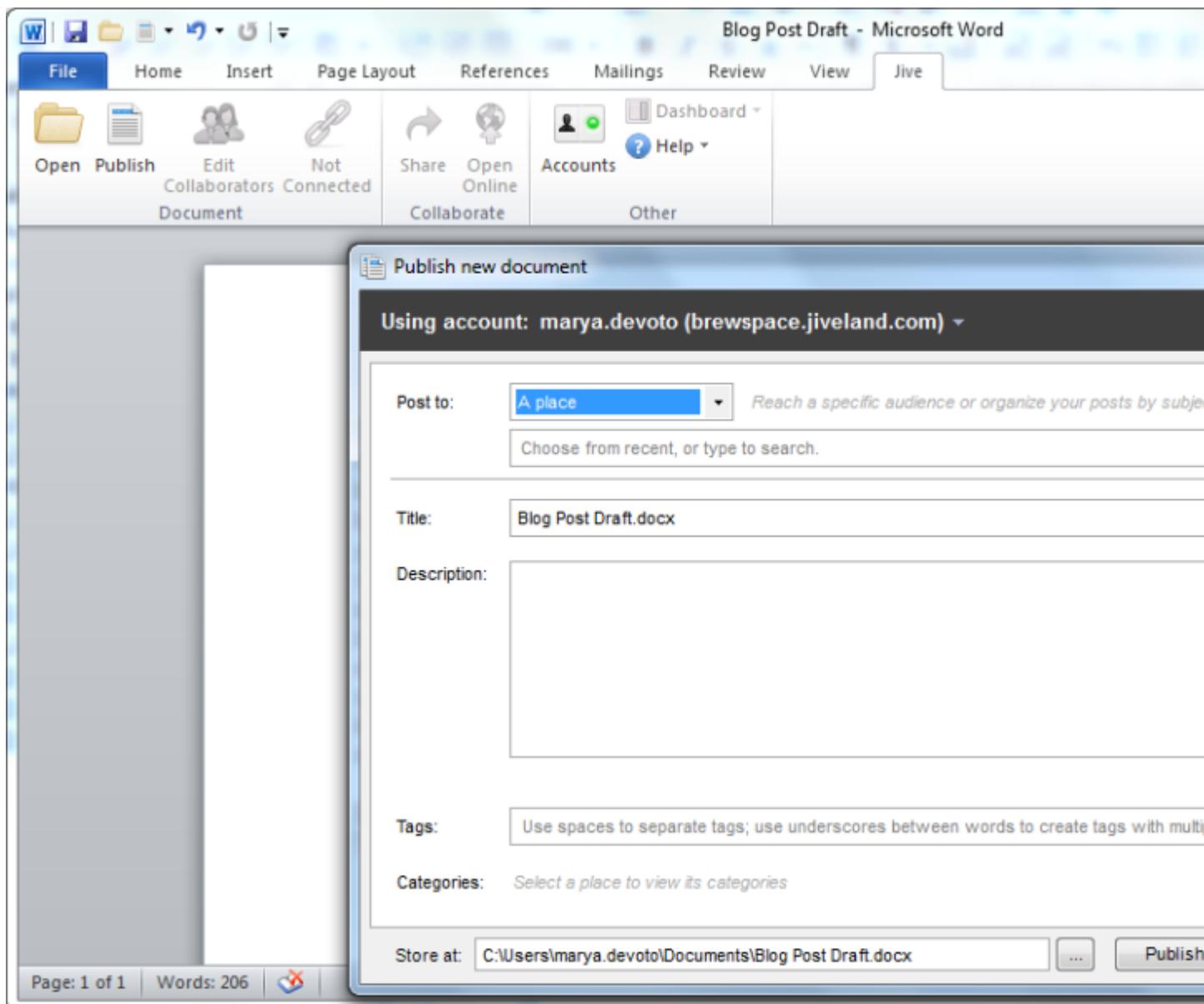
## Adding documents to community

To have an Office document appear in the community, you can either add it using Jive Connects for Microsoft Office or upload the document from inside the community.

### Adding documents from Microsoft Office side

To add a document using Jive Connects for Microsoft Office:

1. Connect to the community. For more information, see [Connecting to your community](#) on page 11.
2. Open or create a document in Microsoft Office.
3. On the ribbon, go to the **Jive** tab.  
Alternatively, on the ribbon, go to **File** and select **Publish to Jive**.
4. In **Document**, click **Publish** to open the **Publish new document** dialog box.



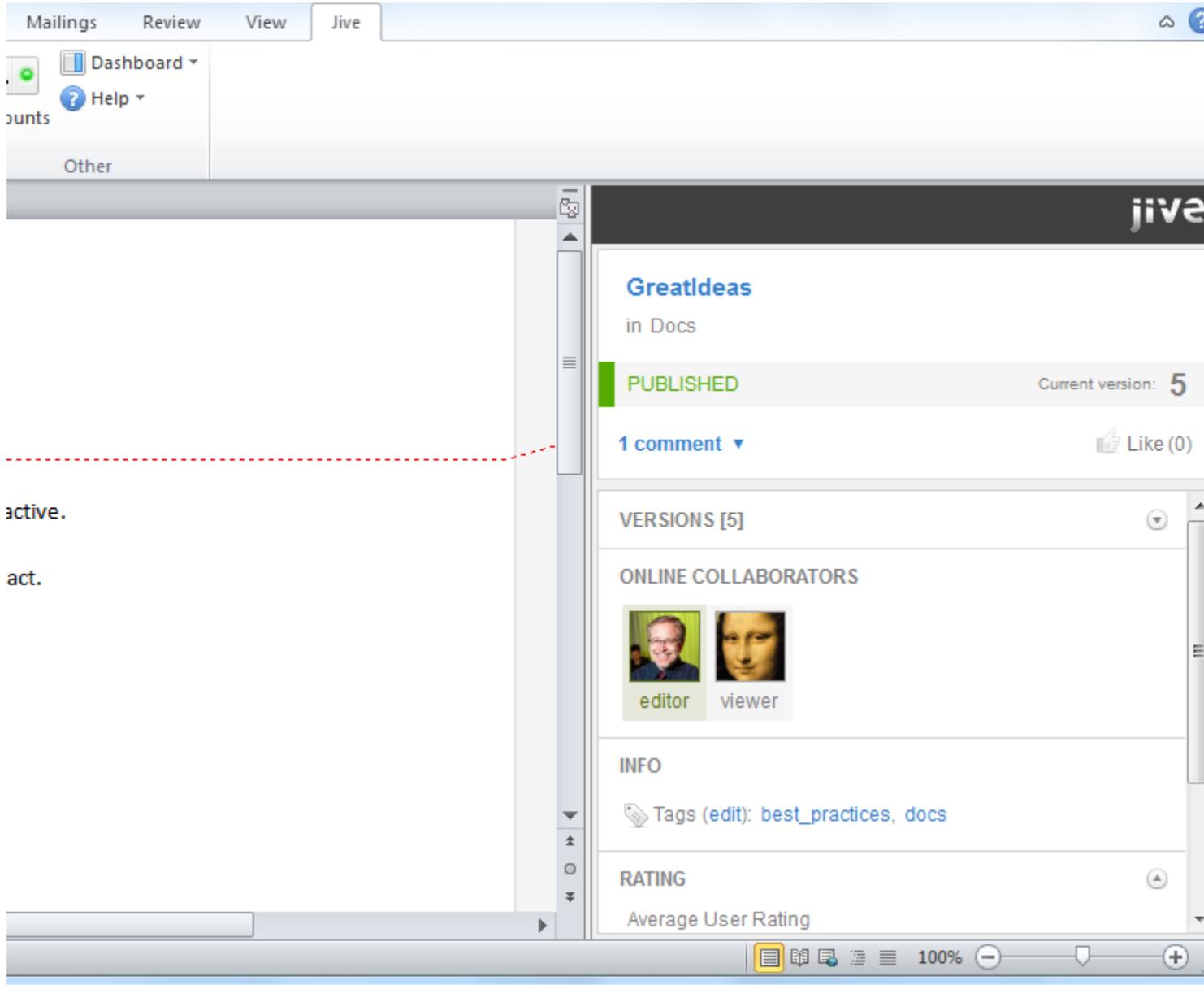
5. In **Post to**, select the place in the community where you want to save the document.
6. In **Title**, enter the name to be used to publish the document.
7. Optionally, in **Description**, enter the description of the document.
8. Optionally, in **Tags**, add tags to help other users find your document in the community.
9. Optionally, in **Categories**, select the place categories for the document.  
This is available only if the selected place has categories configured.
10. In required, in **Store At**, change the local file location for your document.
11. Click **Publish**.

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**Note:** You don't need to save your document or changes to your document locally before publishing to Jive.

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The document is uploaded to the community and the **Jive Dashboards** opens for the document. Alternatively, you can click **Other > Dashboard** on the **Jive** tab to display a panel of information about the document, such as comments, ratings, and the current version number. A Jive Dashboard looks like this:



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**Attention:** When you add an Excel spreadsheet to a community, Jive for Office adds a hidden spreadsheet that contains a copy of the original spreadsheet with additional metadata. This copy is used to track changes and allow collaborative working on the spreadsheet.

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You can synchronize the uploaded documents with the rest of the community: push your changes into uploaded documents and get the changes done by other users. For more information, see [Keeping documents synchronized](#) on page 16.

Once the document is added to the community, you can click **Jive > Dashboard** to display a panel of information about the document, such as comments, ratings, and the current version number. The following image shows the Dashboard.

### Adding documents from the community side

To add a document from inside the community:

1. From your community, click  **(Create) > Document** .
2. Select **Upload a File**.
3. Select the location for your document.
4. Click **Choose File**.
5. Select the file from your desktop.
6. Click **Publish**.

Depending on the size of your document, it might take a few seconds to upload it.

## Copying existing documents

You can upload an existing document and rename it as a new document to start fresh within the community. This creates a new uploaded document in the community, leaving the previously uploaded document in the community as it was when you last synchronized.

The new document will have the content of the previous one, but won't have its other properties, such as comments, collaboration settings, and tags.

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**Note:** Making a new document in this way leaves you with an Office document that has the same content, but without all of the community-related information. To get the previous Office document with that information, go to that document's page in your community and click the **Download** link beneath its preview.

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To create a new document from an existing uploaded document:

1. In an Office app, open the document you want to start from.
2. In the ribbon, go to **Jive** .
3. Select **Publish as a new document**.
4. In the dialog box, select a place in the community where you want to save the document.
5. In the **Title** box, enter the new name.
6. Click **Publish**.

## Keeping documents synchronized

After you've connected your community to Office, Jive Connects for Microsoft Office keeps your documents synchronized with the community.

### What does Jive for Office sync

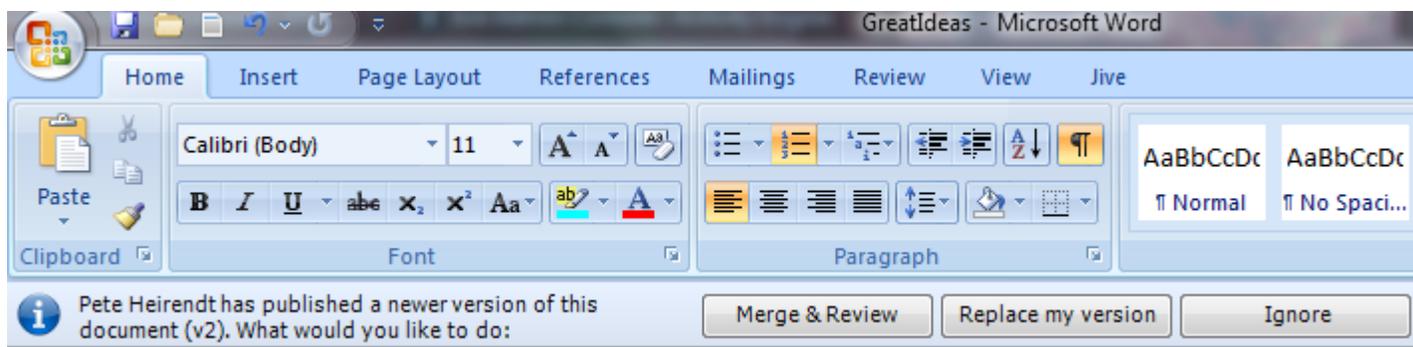
Jive for Office does the following:

- Updates the document preview in the community when you save changes to the document's content.
- Updates the Office document comments list with comments made in the community.
- Lets you see updates from others in your community and review them before using them.
- Keeps changes to community-related document properties in sync between the Office application and the community. When a change is made in one place, it shows up in the other. You can see the following properties in the Dashboard:
  - Tags
  - Categories
  - The document's title
  - The document's description
  - Revision activity
  - Document's state

### Getting updates from community

To get document updates from the community:

1. When your document has been updated by someone in the community, you get a real-time pop-up notification. Alternatively, you can also click **Check for Updates**.



2. If there are no changes, a message tells you so. Otherwise, you can select how you want to deal with the changes:
  - To accept the newer version, overwriting your own local changes, select **Replace my version**.  
You can also use the **Overwrite Local Version** check box from the Jive toolbar at any time if you want to discard your local work and start over with the published version.
  - **Merge and Review** to review which changes you want to use.
  - **Ignore** to continue working without accepting or rejecting changes at this time.
3. When you're done working, save your changes. Others users in the community can see your recent changes.
4. If at any time you want to overwrite the current local document with the version on the community, click **Check for Updates > Overwrite local version** in the Jive toolbar.

### Pushing updates to community

You can edit documents locally in Office apps, and then publish updates to the community.

To upload changes and generate notifications about the update:

- In the ribbon, select **Jive**, then click **Publish > Publish update** .

To upload changes and do not show the update in activity streams:

- In the ribbon, select **Jive**, then click **Publish > Publish update (minor edit)** .

## Opening documents from community

You can open Office documents from your community to edit them in Office app.

To open an uploaded Office document:

1. Open an Office app.
2. In the ribbon, go to **File**, then select **Open from Jive**.

This opens the **Open document** dialog box.

3. If you know the place where the file is uploaded, select it in **From**.

The list of available files is retrieved from the community and displayed in the dialog box.

4. Select the file you want to edit.
5. In **Store at**, specify the location for the file to be stored.
6. Click **Open**.

The file is retrieved from the community and you can edit it. When finished, you can push the changes back to the community, as described in [Keeping documents synchronized](#) on page 16.

## Working with document versions

*As you work on a document in Office, Jive Connects for Microsoft Office keeps track of changes, including community-related information such as comments. It can sync your changes with what's going on in the community with the click of a button. You can even view the changes that have been made since previous versions of the document while in Office. You can also save a previous version as the current one.*

The version management feature does its work in part by using the change tracking feature built into Office. That means that if you download a document that someone has made changes to, you might see revision marks placed there by the change tracking feature. The document is fine, but the revision marks can make it hard to read. You can hide the marks in the following ways:

- In Word 2007 or 2010, select the **Review** tab. In the **Tracking** group, select **Final** in the **Display for Review** menu to hide the changes.
- In Word 2003, locate the **Reviewing** toolbar. In the **Display for Review** menu, select **Final**.

### Work with document revisions

Jive Connects for Microsoft Office creates a new version of a document whenever you save changes to the document.

To view previous versions of a document:

1. Open a community document. You can see the dashboard on the right. If you don't, select Jive in the toolbar and click **Dashboard**.
2. Under **Versions**, if the version you want to see isn't visible, scroll down to display it. Previous versions are listed with the date and time when they were saved. If you hover over a version, you can see the name of the person who published that version.
3. From the list of versions, click the one you want to view.

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**Note:** You can't save a previous version as the current one. To recover a previous version, open that version and publish it under a new name.

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### Work with document activity

Jive Connects for Microsoft Office displays a list of activity related to the document. This activity includes versions saved and comments added. By clicking certain items in the activity list, you can add information to it. For example, you can view and add comments from the **Comments** tab.

To view document activity:

1. In Office, click **Jive** and then click **Dashboard**.

In the **Overview** panel, you can see details about the document, such as when it was last edited and what version you're looking at.

2. Click the arrows next to tags, categories or description to add or edit this information and have it shows up in the community.
3. In the **Comments** tab, click **Reply** to add a comment to the open document. These comments show up in the community as comments. For more information, see [Adding comments](#) on page 19.
4. You can also browse other documents that the author has created or documents similar to the open document.

## Adding comments

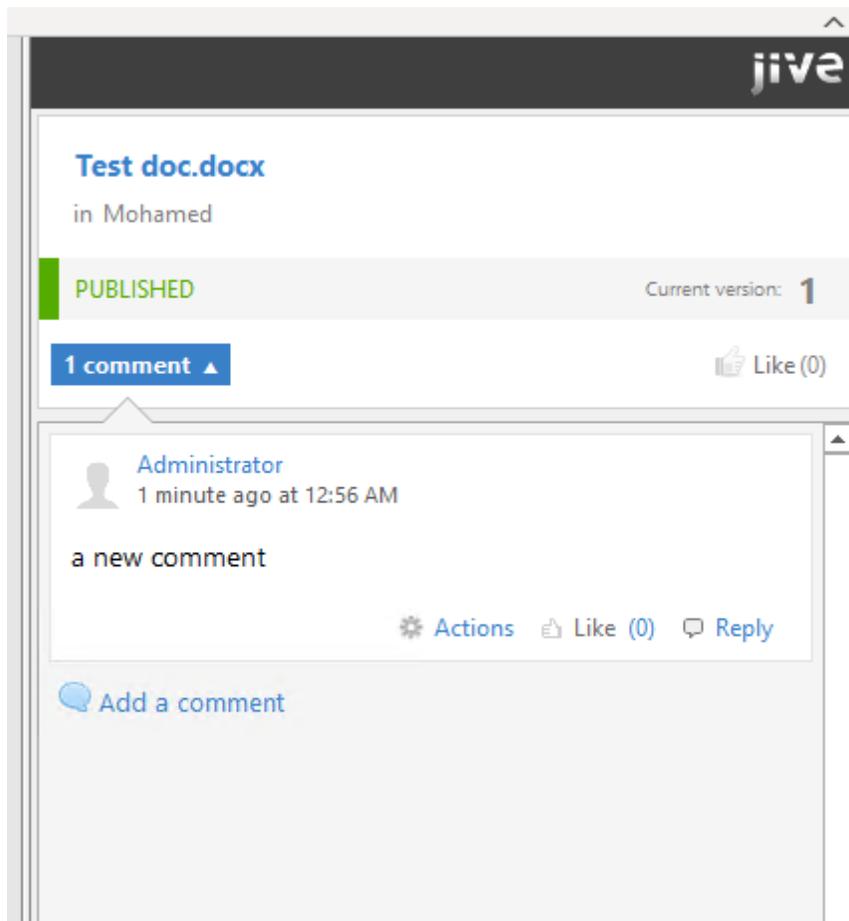
*When you comment on a document in Office or the community (as opposed to adding inline comments in the body of a document), your comments are synchronized and appear in both places. When you add inline comments in either location, these comments are visible where they are created, but are not synchronized or visible from the other location.*

There are two kinds of comments for shared Office documents:

- *Document comments* are like those people make elsewhere in the community. People can usually comment on shared documents just as they comment on other kinds of documents. These are added in the community or in Office. You can see these in Office when you go to **Jive > Dashboard** and then click the **Comments** tab.
- *Inline comments* appear in the document itself. An inline comment is a way to add a comment to a particular part of the document. When you add an inline comment in the community, it shows up in the community on the **Inline Comments** tab at the bottom of the document, as well as in the document preview, but is not visible in Office. Inline comments you create in Office can be seen in the **Review** tab when you select **Final Showing Markup** in the Tracking group, but cannot be seen in the Jive community.

To add a document comment:

1. In Microsoft Office, go to **Jive > Dashboard** , and then click **Comments**.
2. Type your comment.
3. Click **Add a comment**.



4. You can click **Reply** to reply to an existing comment or **Delete** to delete an existing comment.

## Managing collaborators

You can add collaborators to work on your Office documents.

By default, when you use for Office to add a document to your community, the document's collaboration options are set as follows:

- Only you can edit the document when you save to your personal container.
- Anyone can edit it when you save it to an open place.

You can change these defaults to fit the document needs.

To change collaboration options:

1. In Office, open the document you want to start from.
2. In the ribbon, got to the **Jive** toolbar.
3. Click **Collaboration**.

4. In the dialog box, select who can edit the document:
  - **Specific people:** Only the people whose names you choose can make changes. If you select this, begin typing the person's name in the box beneath **Specific people**. When their full name appears, click it to add it to the list.
  - **Just you:** Only you can make changes to the document's content.
  - **Anyone:** Anyone in the community can make changes.
5. Click **Update**.

## Sharing documents with other users

An uploaded document you can share with other community users.

You send a direct message to the user or users, and they receive a notification about the uploaded document.

To share a document from an Office app:

1. In an Office app, open the document you want to start from.
2. In the ribbon, go to the **Jive** toolbar.
3. Click **Share**.

This opens the **Share This Item** dialog box.

4. In **Share With**, select the user whom you want to apprise about the new document.
5. In **Message**, add a comment about the document for the users.
6. Click **Share**.

For more information about sharing content items in Jive, see [Using social groups](#) in the Jive 9.x User Help.

## Disconnecting documents from community

From the **Jive** ribbon tab in your Office app, you can check if the opened document is connected to the community. If necessary, you can break the connection.

To disconnect a document from the community:

1. In an Office app, open the document you want to disconnect.
2. In the ribbon, go to **Jive**.
3. Click **Disconnect**.

Disconnecting a document leaves you with its local copy without all of the community-related information.

Note that connection to community at times cannot be established. In this case, the status of the document cannot be determined. You can try to reconnect the document to the community by clicking **Retry > Connect** . Or you can break the connection regardless of its status by clicking **Retry > Unlink document** .