



Jive Interactive Intranet

## 9.x User Guide

Jive for Outlook

# 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

## Overview

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*With Jive for Outlook, users can view and interact with the community from within their Outlook working environment, including posting and replying to Jive activity. They can also get information about their contacts' activity on other social platforms.*

For details, see the following topics:

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

## System requirements

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

### Hardware requirements

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

### Supported Microsoft Outlook versions

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

- 2007 with Service Pack 2
- 2010
- 2013 (with version 2.5 and higher of Jive for Outlook)
- 2016

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

Currently, Jive for Outlook 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 Outlook 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 Outlook 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 Outlook

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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, or another available marking.
- 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.

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



For details, see the following topics:

- [Getting the Jive for Outlook add-on](#)
- [Connecting to your community](#)
- [Jview and View as email](#)
- [Viewing social information](#)
- [Finding the right person](#)
- [Managing connections to Jive communities](#)
- [Adding external social networks](#)
- [Viewing Your Jive streams in Outlook](#)
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- [Jive Super Search](#)
- [Enabling and disabling Jive for Outlook](#)
- [Controlling default views and previews](#)
- [Updating to new version](#)

## Getting the Jive for Outlook add-on

*You need the Jive for Outlook add-on to connect to Jive and other social platforms from Outlook 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. If you don't have the add-on, you can get it from **Tools** under your avatar.*

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

1. In the community, go to **Your avatar > Tools**.
2. Find the **Jive for Outlook** 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 anti-virus software, then the downloaded installer files are usually scanned for virus. This may stall the installation 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 some time the error message goes away, and the installation resumes.

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After you install the Jive for Outlook add-on, you need to connect it to your community, as described in [Connecting to your community](#) on page 10.

## Connecting to your community

After you first install Jive for Outlook, 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 Outlook 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](#).

## Jview and View as email

When you view notification emails from your community or Super Search 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 emails about. To toggle notifications, 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 image 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, or any other available option.


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 notifications, 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 triangle in the upper left corner of the user's profile photo gets you the mini-social bar view. Note that the mini social bar is not available unless you have the reading pane open.

### 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.


**Style Guide**
[View as Email](#)

in [Writers](#) | [pm-spc-sbs02.eng.jiveland.com](#)

Created by [Marya DeVoto](#) 5 days ago at 10:58



 Like (1)
 Share



### Long sentences


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.

### Short sentences


The most basic sentence is a simple sentence with only one clause. Evaluate each sentence to ensure it contains sufficient information.

22 Views
 [Reply](#)






**Leona Campbell**


[leona.campbell@jivesoftware.com](#)

 Change
Info | Bio | Experience

Title	Senior Documentation Engineer
Phone	503-972-9018
Department	Engineering
Company	Jive Software


"We just released Pointer for Jive.  
<https://community.jivesoftware.com/docs/DOC-7561>"  
on 1/25/2013 4:15:33 PM - [brewspace.jiveland.com](#)

View in:



from [LinkedIn](#)

Jive

Public

Outlook


**Impact Metrics: New Feature Notification**

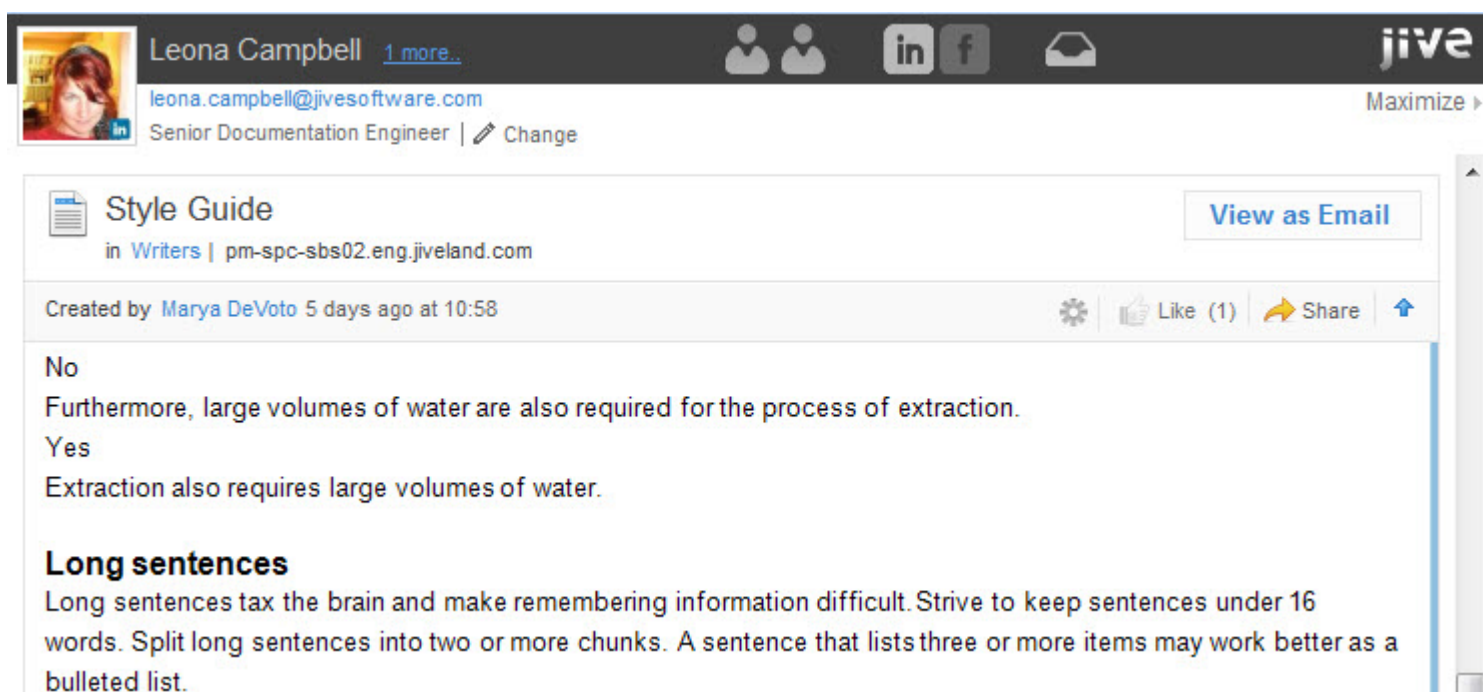
How about this: Have you authored content and wondered about the community reaction to it? Impact Metrics provides insight on how documents and blog posts are received by the community, including

1 hour ago at 12:23 - [brewspace.jiveland.com](#)

## 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 are 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 view information about a different person. You can 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. For more information, see [Finding the right person](#) on page 14.



The screenshot shows the Jive for Outlook interface. At the top, there's a header bar with the Jive logo and a 'Maximize' button. Below the header, a user profile for Leona Campbell is displayed, including her name, email (leona.campbell@jivesoftware.com), and title (Senior Documentation Engineer). To the right of the profile are icons for LinkedIn and Facebook. Below the profile, a document titled 'Style Guide' is shown, with a 'View as Email' button. The document content includes a 'No' section, a 'Yes' section, and a 'Long sentences' section. The 'No' section states: 'Furthermore, large volumes of water are also required for the process of extraction.' The 'Yes' section states: 'Extraction also requires large volumes of water.' The 'Long sentences' section states: '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.'

## Finding the right person

To help Jive for Outlook identify the correct 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 search for a person:

1. In the social pane, click **Change** under the user's avatar.

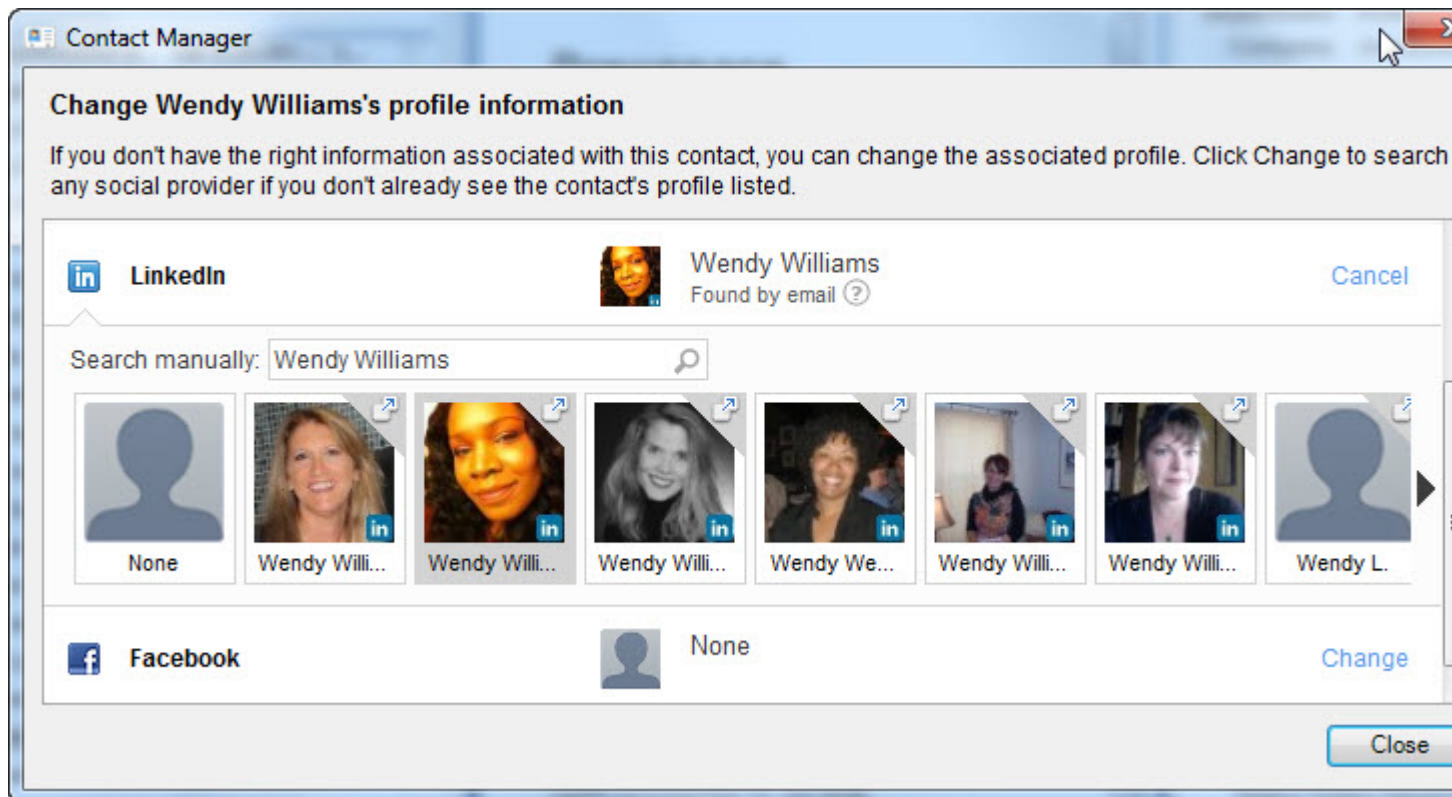
You will see a list of communities and social providers where you can search for the contact.

2. Select one provider and click **Change** to try searching for the contact.

The results 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.





## Managing connections to Jive communities

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

Typically, after you download and install the Jive for Outlook client from your community, your connection will be auto-configured, as described in [Connecting to your community](#) on page 10.

However, you can use the Accounts setting to connect to another 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.

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: You can connect to each Jive community by using only one account.

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For each account you've added to Jive for Outlook, you can edit account settings, enable or disable the connection. You can also disconnect the account from Jive for Outlook.

To create and manage account connections:

1. Click **Accounts** on the Jive toolbar.

This opens the **Manage Accounts** dialog box.

2. Click **Add Account > Jive** to add a new community connection.

3. If you need to edit your credentials or use a different account, select the account and click **Gear icon > Edit** and re-enter the credentials.
4. If you need to temporarily disable connection to an account, select the account and click **Gear icon > Disable** .  
To enable the account again, click **Gear icon > Enable** on the account.
5. If you need to remove an account, select the account and click **Gear icon > Remove** .
6. To change the default Jive account used to connect (when you're connected to multiple Jive communities), select a non-default account and click **Gear icon > 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, select the account and click **Gear icon > Edit** and re-enter the credentials.
5. If you need to temporarily disable connection to an account, select the account and click **Gear icon > Disable** .  
To enable the account again, click **Gear icon > Enable** on the account.
6. If you need to remove an account, select the account and click **Gear icon > Remove** .

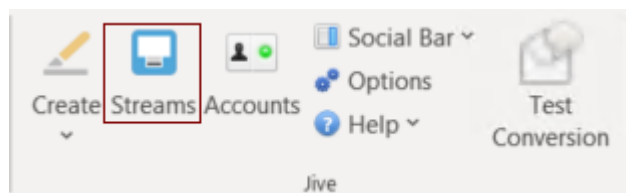
## Viewing Your Jive streams in Outlook

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

Click the Streams button in the Jive toolbar in Outlook. You should see the Jive community (or communities) to which you are connected listed in the drop-down menu. If you have any unread Inbox items, you can 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.



The streams view in Outlook works a little differently than the regular desktop Jive application.

- You can filter your streams by content type and participants 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, 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 will see each of those updates listed individually in Jive for Outlook. Note that 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 as follows:

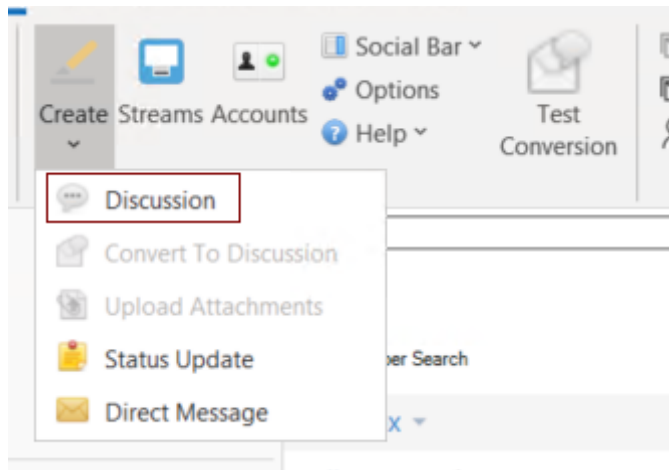
- Click **Options** in the **Jive** section of the toolbar and select or clear the **Disable streams feature** check box. Then click **Ok**.

## Posting discussions to community

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

To create a discussion from Outlook:

1. In the **Jive** section of the menu, click **Create > Discussion**.



2. In the **Title** field, type a title for the discussion.

For example, type "Ideas for upping sales by 500% in March."

3. In the text box, enter the contents for the discussion.

- If you want to alert someone to the discussion directly, click the @ button and start typing the name. Alternatively, type the @ in your discussion. @mentioning sends a notification to the person with a link to the discussion.

4. If you want people to answer a question, select the **Mark This Discussion As a Question** check box.

5. In **Post to**, select how you want to publish the discussion.

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.

Note 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.

6. If you belong to more than one Jive community, in **Post By**, you can change the community you're posting to by selecting community account.

7. Click **Post**.

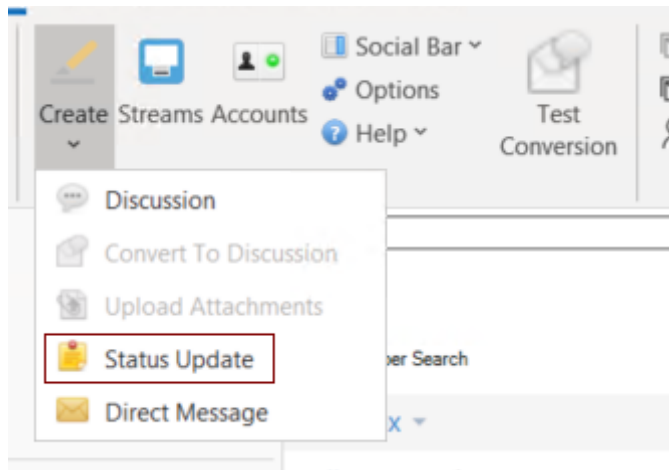
The discussion or question is published as you specified.

## Posting status updates to community

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

To post a status update:

1. In the **Jive** section of the menu, click **Create > Status Update**.



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.

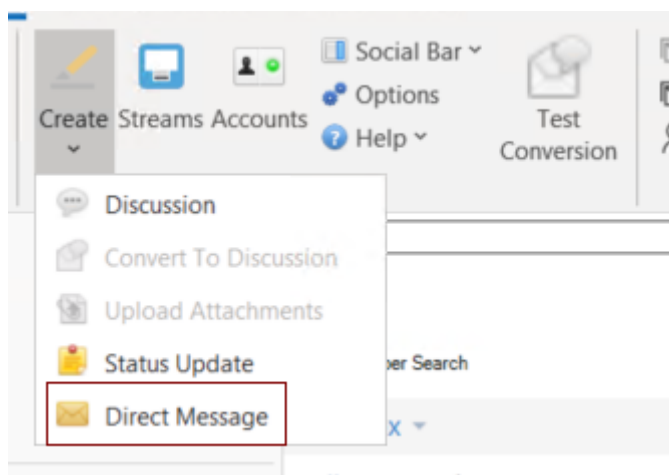
Your status is updated in the community immediately. It may not show up in the Outlook right pane until later.

## 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.

To create a direct message from Outlook:

1. In the **Jive** section of the menu, click **Create > Direct Message**.



Outlook opens a new email window.

2. In **To**, type the first letters of the recipient's name to select the recipient.
3. In **Message**, type the message.
4. Click **Send**.

The message is sent to the recipients.

## 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 is 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 is also be shown as the author in Jive.

To convert an email thread to a discussion:

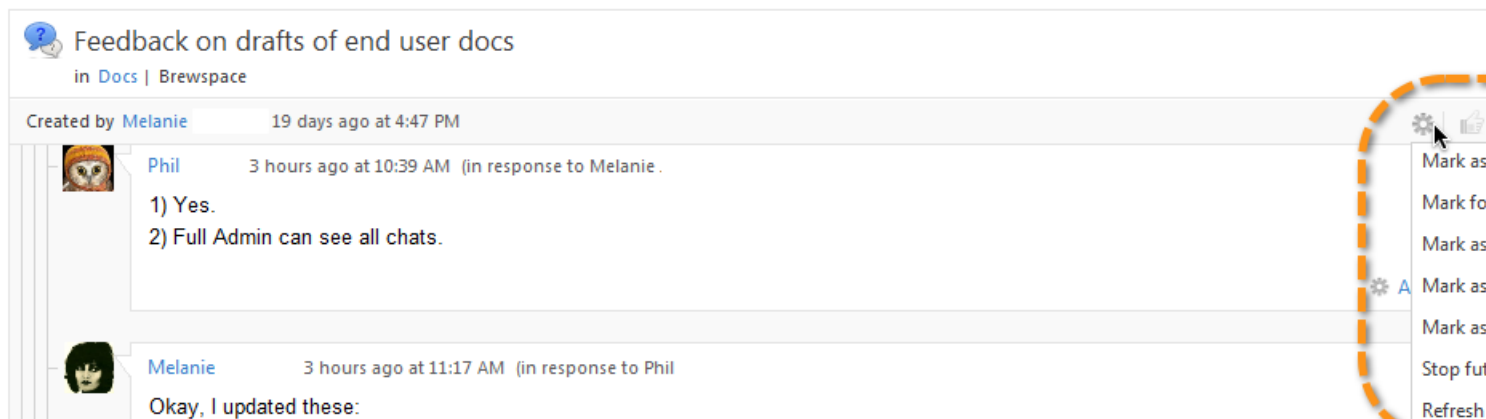
1. In Outlook, select an email you want to convert to a Jive discussion.  
Your discussion will include the email you select plus all the levels above it.
2. Right-click and select **Convert to discussion on Jive**, or click **Create > Convert to Discussion** in the **Jive** toolbar.  
A new email window opens. This email window controls the way your discussion will be posted.
3. In **Post By**, select the account you use to connect to the community.  
This setting 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 **Post To**, 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. Note that the place where you post the discussion determines who can see and respond to it.
5. If you want the discussion to be added as a question, 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. Add a comment to the discussion by typing it in the message box of the email.

# Marking content in Jive from Outlook

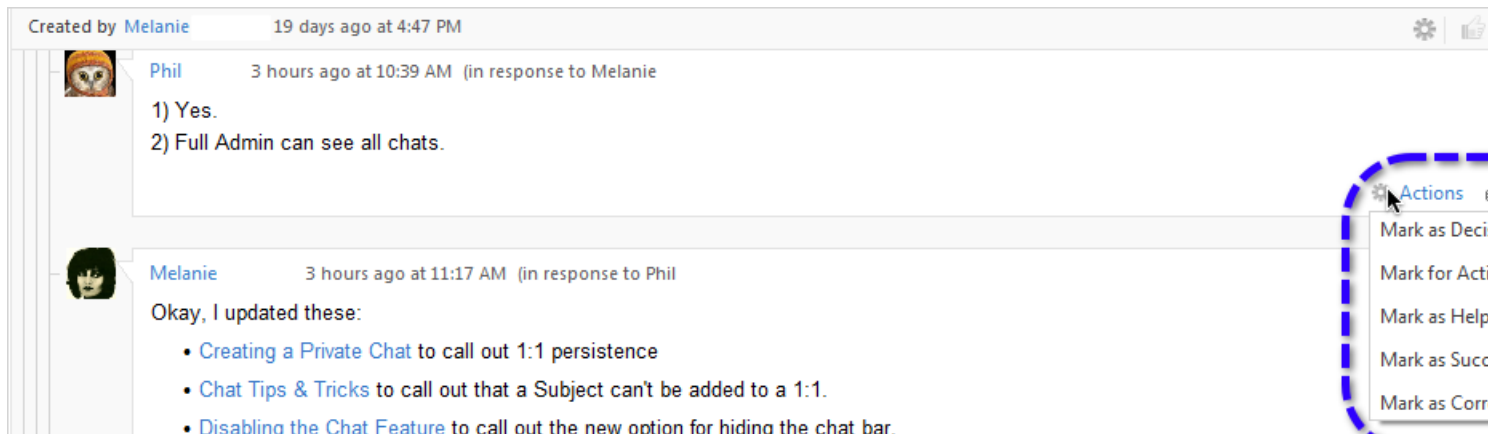
You can mark content as Final, for Action, Outdated, and so on, directly from Outlook.

To get started, 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 by 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 then **Reindex** 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 as follows: by

- Click **Options** in the **Jive** section of the menu and then click **Disable** in the **Super Search** section.

## Enabling and disabling Jive for Outlook

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

Some communities may install Jive for Outlook in a disabled state, so you will 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 added to Outlook toolbar.

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

1. In the **Jive** toolbar, click **Options**.
2. Click **Disable Jive for Outlook**.

This disables Jive for Outlook and restarts the Outlook application.

## 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. In the **Jive** toolbar, click **Options**.
2. To disable preview mode for community notification emails, select the **Disable notification emails preview** check box.

This may be required, for example, if discussions are taking too long to load on your computer.

3. To move the Jive area of the ribbon to the far right, select the **Position Jive ribbon group right most** box.

Changing this setting requires an Outlook restart.

4. Click **OK** to apply the changes.

## Updating to new version

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

You may be prompted to update to the latest version. Alternatively, you can download the latest version from the **Tools** page in your Jive community as follows:

- Go to **Your avatar > Tools** , then download the latest app version.

Either way, you will need to restart Outlook, and you may need to provide your community credentials again.

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## Troubleshooting Jive for Outlook

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*Here you can find typical activities for troubleshooting Jive for Outlook installation.*

For details, see the following topics:

- [Connection troubleshooting](#)

### Connection troubleshooting

If you are 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 of the supported version. For more information, see [System requirements](#) on page 6.