Jive Interactive Intranet

9.x Administrator Guide

Jive for Office

Aurea

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Notices

For details, see the following topics:

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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.

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Jive for Office

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

Here you can find the requirements for Jive and Microsoft Office to run the plugin.

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.

Jive requirements

- Jive 9 or higher

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.

> **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.

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.

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%.

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.

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Administering Jive for Office

As a community administrator, you install and configure the External API plugin and configure the Jive for Office module within the plugin.

For details, see the following topics:

Setting up Jive for Office

The Extended API plugin supports multiple Jive products including the Jive for Office.

Getting up and running with Jive for Office requires installing Extended APIs plugin. Your license then will activate Jive for Office, as well as any other Microsoft plugins you're licensed for.

Install the plugin using the following steps:

1. If you have a version of the Extended APIs plugin earlier than v2.0, or if you have an earlier version of Jive for Office installed, you need to uninstall them before you can install the new Extended APIs.

   Check the Admin Console page at **System** > **Settings** > **Plugins** . If you have a Jive for Office plugin installed, you have the older version and need to remove it. After you remove the old versions and install the new plugin, you should see the new Extended APIs plugin in the Plugins page. If you still see the old plugin, try restarting the Jive server.

2. Install the Extended API plugin, as described in Installing Extended APIs on page 10.
3. Check if Jive for Office is enabled, as described in Enabling or disabling Jive for Office on page 10.

Installing Extended APIs

To add Jive for Office for your community, install the Extended APIs plugin. This plugin supports multiple Jive products, including this one.

Fastpath: Admin Console: System > **Plugins** > **Add Plugin**

You can download the Extended APIs plugin JAR file on the Extended APIs Plugin page on Worx. After you add this plugin, you need to restart Jive in order for the feature to become available.

To install the Extended API plugin:

1. In the Admin Console, go to **System** > **Plugins** > **Add Plugin** .
2. Under **Install a new plugin**, click **Browse** to select and open the plugin JAR file you downloaded.
3. Click **Upload** to add the plugin to the community.
4. Restart the application as root: `/etc/init.d/jive-application restart`. For a cluster installation, restart each node.
5. Once the application has restarted, go to **System** > **Plugins** > **Installed Plugins** and check the list for the Extended APIs plugin. This is also where you can remove the plugin.
6. Go to **System** > **Settings** > **Extended APIs** , then open the **Modules** tab and ensure the modules you want are enabled.

Enabling or disabling Jive for Office

Jive for Office is enabled by default if the license permits it. If required, you can disable this module.

Fastpath: Admin Console: System > **Settings** > **Extended APIs**

To disable or enable Jive for Office:

1. In the Admin Console, go to **System** > **Settings** > **Extended APIs** .
2. On the **Modules** tab, select or clear the **Is Enabled** check box to enable or disable the Jive for Office module.

Installing client for users

You can allow users to install the client program themselves from the **Tools** menu in the community, or use an MSI to push it to their desktops.

You can allow users to install the client program manually from the **Tools** page in the community user interface or directly from `YourCommunityURL/artifact/download/office.exe`. Additionally, you can push the client to user desktops is either enabled or disabled mode.

You can download the .msi or .exe installation file in the Admin Console. Go to **System** > **Settings** > **Jive for Office** and open the **Client Binaries** tab.

Note: If you're pushing the client to desktops by using the MSI installer, you must ensure the client meets the minimum system requirements. The MSI will not verify the requirements.

- To add or remove Jive for Office downloading the client from the **Tools** page:
  a) Go to **System** > **Settings** > **Extended APIs** , then the **Desktop Applications** tab.
  b) To add Jive for Office download to the **Tools** page, select the **Is Download Enabled** check box for Jive for Office.
  c) To remove Jive for Office download from the **Tools** page, clear the check box for Jive for Office.

  This setting is enabled by default.
- To install the client separately for all the users on one machine, use the argument `INSTALLFORALLUSERS=1` when running the MSI.
  - Setting `INSTALLFORALLUSERS=0` installs the program for only the current user.

    Note: This is the default installation of Jive for Office; it does not require admin rights and will install the add-in for the current user.

  - `INSTALLFORALLUSERS=2` creates a single installation on the client computer in Program Files, to be used by all users who use the computer.
- To install the client silently on multiple machines, use the `/q` argument.

Auto-updating client binaries

You can set client binaries to be automatically installed on your server from the Cloud. Alternatively, you can choose to update client binaries manually.

Fastpath: **System** > **Settings** > **Extended APIs**

By default, Jive for Office auto-updates the client software on your server. This ensures that when a new client version becomes available, it becomes available to your users and they get prompted to download it. Note that users can always choose not to install the update: it isn't automatically installed.

You can see a log showing when Jive checks for a new version or downloads one at **System** > **Settings** > **Extended APIs** , on the **Auto-update Logs** tab. You will also receive an email alerting you when an auto-update completes.

If you don't want the binaries to be automatically updated on your server, you can choose manual updating. When manual updates are enabled, Jive alerts you by email when new client binaries are available. Thus you can decide when and whether to make them available on your server for users to download.

Note:

If you use SSO or reverse proxying in your environment, you must exclude the following URL from authentication to enable auto-updates:

`SERVER_URL/artifact/download/office.msi`

If you use a proxy server to access the Internet, you may encounter some issues with auto-update. For more information, see Connecting through proxy server in the Jive 9.x Community Manager Help.

To set up auto-updates:

1. In the Admin Console, go to **System** > **Settings** > **Extended APIs** , and then open the **Desktop Applications** tab.
2. In **Auto-update Mode**, select the update mode:
    - **Automatic** enables auto-updates.
    - **Manual** enables notifications about available updates.
    - **Off** disables updates and notifications.
3. Click **Update** to save the settings.

With auto-updates enabled, when new client updates come through, the plugin automatically updates, and you always have the latest version of the client software.

Client installation parameters

Here you can find the list of installation parameters for the Jive for Office client.

Argument	Description
`/q`	Silent installation.
`DISABLEATSTARTUP`	• `0`: Toolbar enabled (in registry: `Addindis-abled=false`). • `1`: Office toolbar enabled; Outlook toolbar appears disabled but can be enabled (in registry: `Addindis-abled=true`). • `2`: Toolbar disabled and doesn't appear at all (in registry: `Addindisabled=disable`).
`INSTALLFORALLUSERS`	• `0`: Installation only for current user • `1`: Installation for each user separately. • `2`: Per-machine installation.
`INSTALLDIR`	Installation directory. By default, `localappdata` is used. This is relevant only when installing for current user or per machine. If the installation is for each user separately, the client is installed in the `localappdata`.
`DEFAULTSERVERURL`	Default Jive instance when adding an account.
`FORCELOGINTYPE`	Force authentication behavior override. If not used, authentication is auto-detected. Possible values are `Basic`, `oAuth`, or `SSO`. For more information, see Configuring authentication on page 16.
`DISABLEAUTOUPDATE`	Client won't check for or download updates.
`APPDATAPATH`	Location for the following data: branding, Jive Diagnostics, account settings, app settings, cache.
`BIGAPPDATAPATH`	Location for the following data: logs, avatars and images, bins.
`DISABLEDOCUMENTRATING`	Removes the rating option from the Dashboard on documents. Possible value is `true`. This parameter is available from version 2.5.

Argument	Description
ShowOfficeDashbaord	Removes the Office Dashboard sidebar. Possible values are `true` or `false`. This parameter is available from version 30.6.0.
EnforceTLS12	Usage of the TLS 1.2 protocol. Possible values are `true` or `false`. This parameter is available from version 30.6.0.
DisablePostToEntireCommu-nity	Disabling the possibility to post documents to the entire community. Possible values are `true` or `false`. This parameter is available from version 30.7.24.

Remote client customization

You can enable and disable client features by creating an administrator script in the Admin Console, then pushing it to client machines.

Fastpath: Admin Console: System > **Settings** > **Jive for Office** > **Advanced**

If you have many users of the Jive for Office client and you need to disable some of the features, you may want to create a script and push changes to the registry on each client computer. The script creates a series of keys on the client. Note that the changes you make to `HKEY_CURRENT_USER` always override the settings in `HKEY_LOCAL_MACHINE`. For a list of the keys and what they control, see Remote client customization reference on page 14. For the list of features you can enable and disable, refer to Client installation parameters on page 13.

This feature is available from Jive for Office 5.0.1.2.

You can select which features to enable and disable in the Admin Console and then generate a script by using the following steps:

1. In the Admin Console, go to **System** > **Settings** > **Jive for Office** > **Advanced** .
2. Under **Shared settings**, select the settings you want to propagate to the client.
3. Click **Generate**.

This generates a `settings.reg` file to run on the clients' machines. The script updates the default settings for the Jive for Office and Jive for Outlook plugins.

Remote client customization reference

Remote client customization creates a script that modifies the registry keys in `HKEY_LOCAL_MACHINE\SOFTWARE\Jive` or `HKEY_CURRENT_USER\SOFTWARE\Jive`. You can use it to override authentication settings or to auto-populate the community URL for new users.

Setting community URL

If you want new users to have the URL auto-supplied after a client installation, so they don't have to fill it in, you can create a remote client customization script with or without additional changes. The Jive instance URL will be pushed to clients so they can connect more easily. Note that users who download the client from the Tools page will have this URL auto-populated without any remote client customization.

Overriding authentication settings

By default, the client's authentication settings are automatically set based on detecting the user's existing authentication scheme with Jive.

You can override the authentication settings set on the client by selecting **Force authentication behavior override** and selecting an authentication mode. For more information, see Setting up authentication method on page 16 and Setting SSO connection behavior for Jive for Office on page 17. Note that if you create an override by using remote client customization, it needs to match these settings.

: This is typically an expert administrator use case for when you need to troubleshoot client issues for all your users. It is not recommended for standard deployments.

Available options for remote client customization

Setting	Description
Jive instance URL	The Jive URL for the client to connect to.
Force authentication behavior override	The authentication method to be used by Jive for Office.
Disable HTTP header "Expect: 100-continue;" that passes automatically in POST requests	`True` disables this header for specific cases where authentication troubleshooting is required.
Don't suppress script errors in the browser control used to authenticate session-based/oAuth clients	`True` displays script errors for troubleshooting purposes.
Don't display the user's private container to clients	`True` means that private folders like **Files Created by You** are not available when uploading files to Jive.
Disable auto-update for all clients	`True` prevents client machines from auto-updating, prevents polling requests from occurring, and removes all UI components that have to do with the feature.
Disable Document Rating feature	`True` prohibits document rating from Office apps.

Configuring authentication

You can set up the default authentication method Jive for Office must use to connect Microsoft Office apps with your Jive community.

Authentication methods overview

The authentication method you choose for your community depends on the required balance between user security and convenience.

You have several options for user authentication with Jive for Office. The method you choose depends on your security requirements and user convenience. The best practice is OAuth because, for most users, this method will integrate most securely and seamlessly with an existing SSO implementation. However, the following descriptions provide further information about each method so you can select the best method for your community. For more information about how to set the authentication method, see Setting up authentication method on page 16.

Basic authentication

With basic authentication, credentials are saved locally and passed in Base64 format with each HTTP request. The credentials only need to be provided once. This method is the least secure.

Session-based authentication

Session-based authentication saves credentials by using cookies, which expire according to the policy you set in Jive or in your SSO implementation. Session-based authentication is much more secure than basic authentication but can require users to provide credentials frequently.

OAuth authentication

OAuth provides a process for client users to authorize third-party access to their server resources without sharing their credentials (typically, a username and password pair), by using user-agent redirections. In Jive for Office, this means that user credential information is secured within Jive, and then persisted in a token that can be refreshed for a specified period of time. The default setting is one year. If necessary, the token can be expired manually at any time by the client user using the **Desktop Applications** tab of the user's **Preferences** page (accessed from the menu under the user's name). This method best balances security and convenience and is used by default.

Setting up authentication method

You can set the authentication method for Jive for Office users in the Admin Console.

Fastpath: **Admin Console: System** > **Settings** > **Jive for Office** , then the **Advanced** tab

You can set the authentication method used for Jive for Office in the Advanced tab. For information about available authentication methods, see Authentication methods overview on page 16. The default setting and the recommended authentication method for most users is OAuth.

You can also use remote client customization to set the authentication method. However, this method is not recommended unless you have a problem using the non-registry method. If you do need to use remote client customization, make sure the settings match what you have set elsewhere. For more information, see Remote client customization on page 14.

To set your default authentication method:

1. In the Admin Console, go to **System** > **Settings** > **Extended APIs** , then open the **Desktop Applications** tab.
2. Under **Authentication Method**, choose the authentication method you want to use.
3. Click **Update**.
4. If you chose OAuth as your authentication method, then enable OAuth, as described in Enabling OAuth on page 17.
5. Restart your Jive server.

   The changes will affect your server, and your client users will be prompted to reauthenticate the next time they interact with Jive for Office.

If required, you can set up an override for the authentication method. For more information, see Setting SSO connection behavior for Jive for Office on page 17.

Enabling OAuth

Here you can find the settings you need to configure if you use OAuth as the authentication method for Jive for Office.

OAuth provides a process for client users to authorize third-party access to their server resources without sharing their credentials (typically, a username and password pair), using user-agent redirections.

To enable OAuth, configure the following settings in your company's proxy and firewall:

- Allow `#JIVESERVER#/api/oauth2/*` calls without any authentication headers.
- Accept the `oauth2` authorization header as a valid and authenticated call to the server.

  For example: `Authorization: oauth2 xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx`
- If you want to enable auto-updates, allow outgoing network access through the firewall to `files.jivesoftware.com`.

Setting SSO connection behavior for Jive for Office

By default, the Jive for Office client program auto-detects any SSO configuration and allows the client program to connect to your community accordingly. However, you can override this behavior by creating administrator scripts and deploying them to client computers.

Fastpath: **System** > **Settings** > **Jive for Office** , then the **Advanced** tab

The Jive for Office client typically auto-detects your Jive SSO configuration. If you want to specify how clients should connect, you can use remote client customization to create an administrator script that modifies the registry. These customization affect Jive for Office and Jive for Outlook for any users who have them installed.

For more information about available authentication methods, see Authentication methods overview on page 16.

To create a script that sets the SSO connection method on the client:

1. In the Admin Console, go to **System** > **Settings** > **Jive for Office** , then the **Advanced** tab.
2. Select the **Force authentication behavior override** check box to enable authentication overrides.
3. Select one of the following to select the authentication method:
   - **Force session-based authentication login** to enforce using the Jive SSO implementation. Session-based authentication is more secure, but requires users to provide credentials more frequently.
   - **Force basic authentication** to enforce that clients connect using basic authentication by username and password. This method is more convenient, but less secure.

Troubleshooting Jive for Office

Here you can find typical activities for troubleshooting Jive for Office installation.

Obtaining Jive for Office logs

Since Jive for Office is locally installed on users' machines, you may need the local logs from a computer that is having an issue.

Logs have high-level information that may prove useful in the course of our investigation and may help expedite a resolution for your case.

To find Jive for Office logs:

1. Press Windows+R to start the Run command window.

   Alternatively, you can also launch the window from **Start** > **Run** (Windows XP) or use the **Search programs and files** (Windows 7 and 8+).
2. Copy `%appdata%/Offisync/logs` into **Open** box and click **OK**.

This opens the folder containing the logs. Each file is named according to the application it was recorded under. So for example, `Toolbar_WINWORD_v12` would be for Word, and `Toolbar_OUTLOOK_v16.log` would be for Outlook.

Each successive time you shutdown and restart the application, a new copy is created and appended an incremented number. Thus the oldest log will have the highest number, and the most recent should not have a number.

Resetting binaries

If you need to work with Support to troubleshoot problems with updating your client version, you can use the manual update and Reset Binaries settings to make sure you have the correct version of the client binaries on your server.

Note: Don’t use these settings without a recommendation from Support.

Fastpath: **Admin Console: System** > **Settings** > **Jive for Office**

To reset the binary:

1. In the Admin Console, go to **System** > **Settings** > **Jive for Office** , and then go to the **Client Binaries** tab.
2. Check to see what version you'll be updating to. You can see the Jive for Office client version you currently have installed on your servers displayed. If an update is required, you will also see a button prompting you to replace your installed client binaries with the latest build of the client software. If you want your users to be prompted to install the latest client version next time they log in, click the button. You should see the new version displayed, and the button will go away.
3. If you don't succeed in updating the binaries to the correct version this way (for example, if the update appears to succeed but your users can't download the client from the Tools page), you can try clicking **Reset Binaries** on the **Client Binaries** tab. Resetting the binaries deletes the binaries posted on your server. They can be recovered by using the auto-update setting.

   Note: This resets the binaries for the Jive for Outlook and Jive for Office clients.

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Using Jive for Office

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

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.

   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.

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 22.

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 23.

Adding documents to community

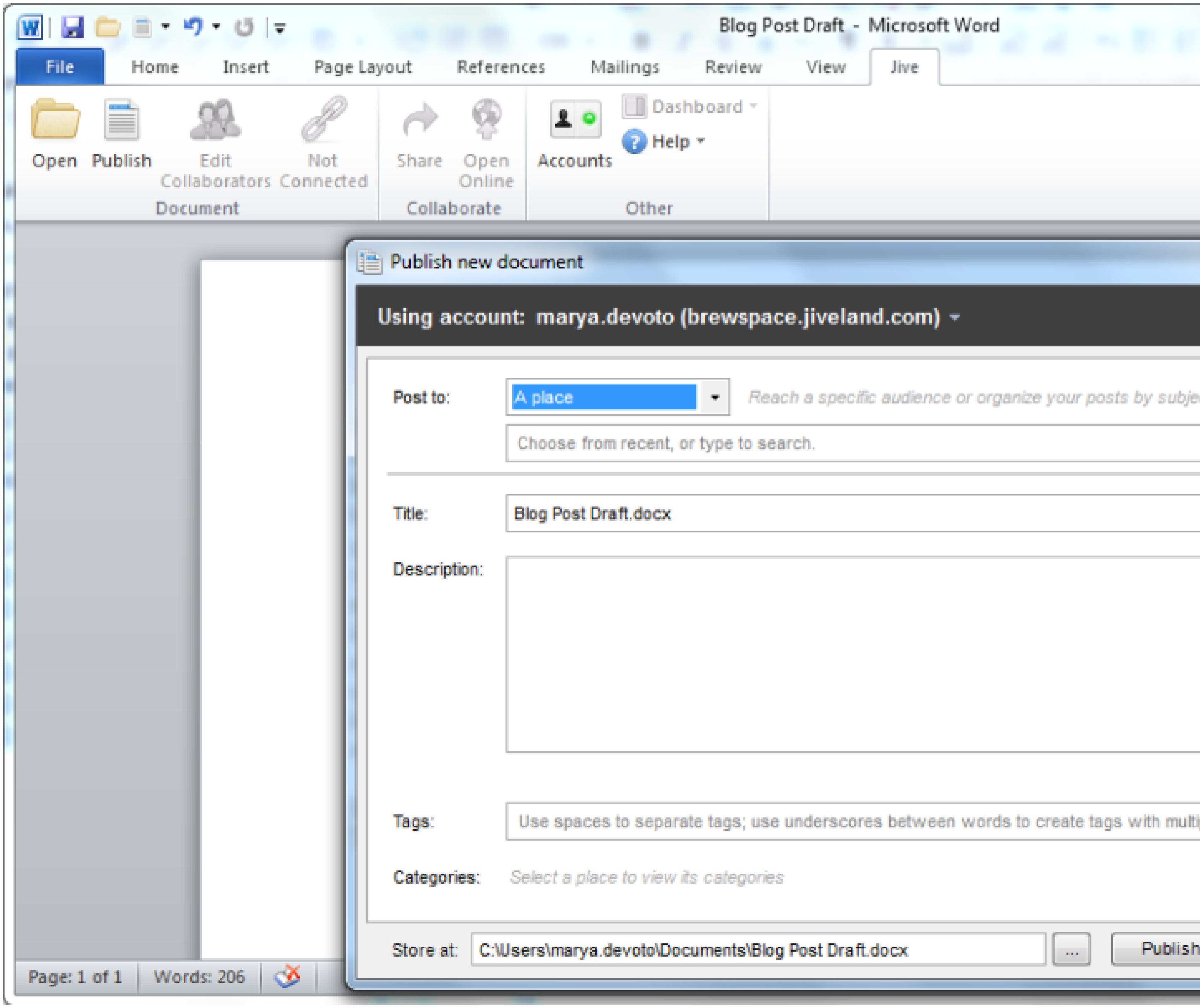
To have an Office document appear in the community, you can either add it using Jive Connects for Microsoft Office or upload the document from inside the community.

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 22.
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.

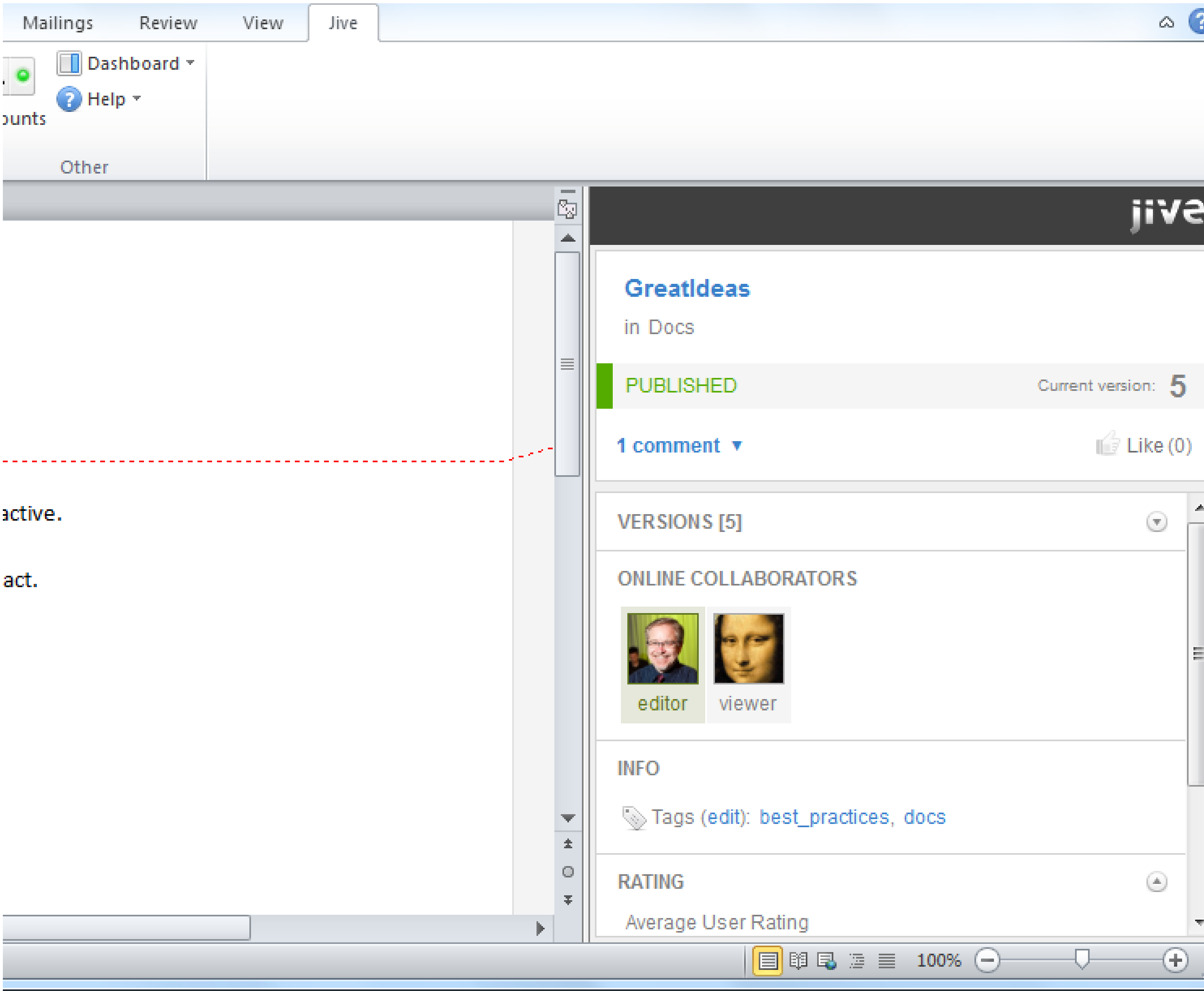


5. In **Post to**, select the place in the community where you want to save the document.
6. In **Title**, enter the name to be used to publish the document.
7. Optionally, in **Description**, enter the description of the document.
8. Optionally, in **Tags**, add tags to help other users find your document 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**.

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

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:



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.

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 27.

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.

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.

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

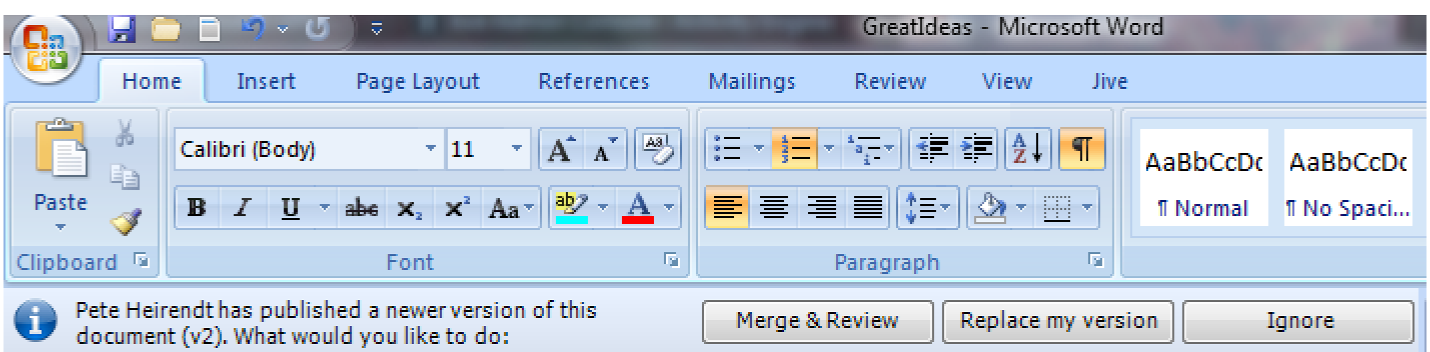
Jive for Office does the following:

- 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 user 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 27.

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.

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.

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 30.
4. You can also browse other documents that the author has created or documents similar to the open document.

Adding comments

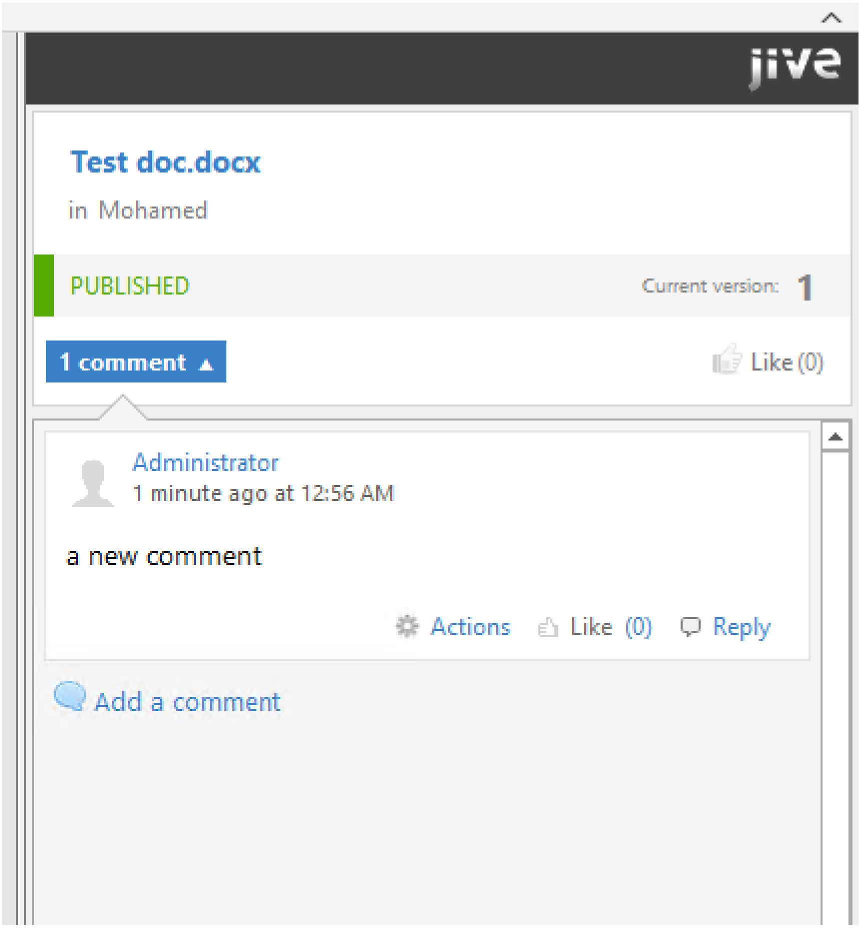
When you comment on a document in Office or the community (as opposed to adding inline comments in the body of a document), your comments are synchronized and appear in both places. When you add inline comments in either location, these comments are visible where they are created, but are not synchronized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

Disconnecting documents from community

From the **Jive** ribbon tab in your Office app, you can check is 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** .