

Cloud Administrator Guide

Jive for Office



Notices

For details, see the following topics:

- Notices
- Third-party acknowledgments

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Table of Contents

Aurea global support		
Chapter 1: Jive for Office	6	
System requirements	6	
Supported browsers	7	
Chapter 2: Administering Jive for Office	9	
Enabling or disabling Jive for Office	9	
Installing client for users	9	
Auto-updating client binaries	10	
Client installation parameters	11	
Remote client customization	12	
Remote client customization reference	13	
Configuring authentication	14	
Authentication methods overview	14	
Setting up authentication method	15	
Enabling OAuth	16	
Troubleshooting Jive for Office	16	
Obtaining Jive for Office logs	16	
Resetting binaries	17	

Chapter 3: Using Jive for Office	18
Working with shared office documents	
Getting Jive for Office add-on	19
Connecting to your community	
Adding documents to community	21
Copying existing documents	
Keeping documents synchronized	
Opening documents from community	
Working with document versions	27
Adding comments	
Managing collaborators	
Sharing documents with other users	
Disconnecting documents from community	

Aurea global support

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

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 Cloud

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* (on Macs only).
- Mobile Safari on iPhone and iPad for iOS 11 and later. (For a browser-independent native iOS phone app, be sure to look for the Jive Daily: Intranet on the go app, if your community uses it, in the App Store.)

- Mobile Chrome on Android devices for Android 8 and later. (For a browser-independent native Android phone app, be sure to look for the Jive Daily: Intranet on the go app, if your community uses it, in Google Play.)
- Mozilla Firefox*.
- Google Chrome*.

* Google Chrome, Mozilla Firefox, Apple Safari, 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:

- Chromebook is not supported.
- 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 Administering Jive for Office

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

For details, see the following topics:

- Enabling or disabling Jive for Office
- Installing client for users
- Remote client customization
- Configuring authentication
- Troubleshooting Jive for Office

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 <code>YourCommunityURL/artifact/down-load/office.exe</code>. 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 Cloud 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	 o: 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 sepa- rately, the client is installed in the localappdata.

Argument	Description
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 14.
DISABLEAUTOUPDATE	Client won't check for or download updates.
APPDATAPATH	Location for the following data: branding, Jive Diagnos- tics, account settings, app settings, cache.
ВІGАРРДАТАРАТН	Location for the following data: logs, avatars and im- ages, bins.
DISABLEDOCUMENTRATING	Removes the rating option from the Dashboard on documents. Possible value is true.
	This parameter is available from version 2.5.
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 13. For the list of features you can enable and disable, refer to Client installation parameters on page 11.

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 Of 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 15. 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.

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 troubleshoot-ing is required.
Don't suppress script errors in the browser control used to authenticate session-based/oAuth clients	True displays script errors for trou- bleshooting purposes.
Don't display the user's private contain- er 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 compo- nents that have to do with the feature.
Disable Document Rating feature	True prohibits document rating from Of- fice apps.

Available options for remote client customization

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 15.

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 14. 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 12.

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 16.
- 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.

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 xxxxxxx-xxxx-xxxx-xxxx-xxxxx

• If you want to enable auto-updates, allow outgoing network access through the firewall to files.jivesoftware.com.

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.

3

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
- 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 or the Jive for Office 365 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 20.

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 21.

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 20.
- 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.

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- 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.
- 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:

Mailings Review View Jive	
 Dashboard * Help * 	
Other	
	live
	GreatIdeas in Docs
	PUBLISHED Current version: 5
	1 comment v 🖆 Like (0)
active.	VERSIONS [5]
act.	ONLINE COLLABORATORS
	editor viewer
	INFO
	Tags (edit): best_practices, docs
	RATING
>	Average User Rating

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 25.

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:

 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.

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- 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 25.

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 28.
- 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.

Test doc.docx in Mohamed				
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 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 Cloud 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**.