



Jive Interactive Intranet

## Cloud Administrator Guide

Jive for Outlook

# Notices

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For details, see the following topics:

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

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# Table of Contents

<b>Aurea global support.....</b>	<b>6</b>
<b>Chapter 1: Overview.....</b>	<b>7</b>
System requirements.....	7
Supported browsers.....	8
<b>Chapter 2: Administering Jive for Outlook .....</b>	<b>10</b>
Enabling or disabling Jive for Outlook.....	10
Installing client for users.....	10
Auto-updating client binaries.....	11
Client installation parameters.....	12
Configuring authentication.....	14
Authentication methods overview .....	14
Setting up authentication method.....	14
Enabling OAuth.....	15
Remote client customization.....	16
Remote client customization reference.....	16
Theming Jive for Outlook.....	18
<b>Chapter 3: Using Jive for Outlook.....</b>	<b>20</b>
Getting the Jive for Outlook add-on.....	21
Connecting to your community.....	22
Jview and View as email.....	22
Viewing social information.....	24
Finding the right person.....	26
Managing connections to Jive communities.....	27
Adding external social networks.....	28
Viewing Your Jive streams in Outlook.....	28
Posting discussions to community.....	29
Posting status updates to community.....	30
Sending direct messages to community users.....	31
Converting email threads to discussions.....	32
Marking content in Jive from Outlook.....	33
Jive Super Search.....	34
Enabling and disabling Jive for Outlook.....	34
Controlling default views and previews.....	35
Updating to new version.....	35

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<b>Chapter 4: Troubleshooting Jive for Outlook.....</b>	<b>36</b>
Obtaining Jive for Outlook logs.....	36
Resetting binaries.....	36
Connection troubleshooting.....	37

# 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.
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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

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

### 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.

### Jive software requirements

- Jive Cloud

### 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 8 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.

---

## 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.

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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:**

- 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 Outlook

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

For details, see the following topics:

- [Enabling or disabling Jive for Outlook](#)
- [Installing client for users](#)
- [Configuring authentication](#)
- [Remote client customization](#)
- [Theming Jive for Outlook](#)

## Enabling or disabling Jive for Outlook

Jive for Outlook 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 Outlook:

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 Outlook 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/outlook.exe`. Additionally, you can push the client to user desktops in either enabled or disabled mode.

You can download the .msi or .exe installation file in the Admin Console. Go to **System > Settings > Jive for Outlook** 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 Outlook downloading the client from the **Tools** page:
  - a) Go to **System > Settings > Extended APIs** , then the **Desktop Applications** tab.
  - b) To add Jive for Outlook download to the **Tools** page, select the **Is Download Enabled** check box for Jive for Outlook.
  - c) To remove Jive for Outlook download from the **Tools** page, clear the check box for Jive for Outlook.

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.

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

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- `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.

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

---

By default, Jive for Outlook 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/outlook.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 Outlook client.

Argument	Description
/q	Silent installation.
DISABLEATSTARTUP	<ul style="list-style-type: none"><li>• 0: Toolbar enabled (in registry: <code>Addindisabled=false</code>).</li><li>• 1: Office toolbar enabled; Outlook toolbar appears disabled but can be enabled (in registry: <code>Addindisabled=true</code>).</li><li>• 2: Toolbar disabled and doesn't appear at all (in registry: <code>Addindisabled=disable</code>).</li></ul>
INSTALLFORALLUSERS	<ul style="list-style-type: none"><li>• 0: Installation only for current user</li><li>• 1: Installation for each user separately.</li><li>• 2: Per-machine installation.</li></ul>
INSTALLDIR	Installation directory. By default, <code>localappdata</code> 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 <code>localappdata</code> .

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 <code>Basic</code> , <code>oAuth</code> , or <code>SSO</code> .  For more information, see <a href="#">Configuring authentication</a> on page 14.
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 <code>true</code> .  This parameter is available from version 2.5.
ShowOfficeDashbaord	Removes the Office Dashboard sidebar. Possible values are <code>true</code> or <code>false</code> .  This parameter is available from version 30.6.0.
EnforceTLS12	Usage of the TLS 1.2 protocol. Possible values are <code>true</code> or <code>false</code> .  This parameter is available from version 30.6.0.
DisablePostToEntireCommunity	Disabling the possibility to post documents to the entire community. Possible values are <code>true</code> or <code>false</code> .  This parameter is available from version 30.7.24.

## Configuring authentication

You can set up the default authentication method Jive for Outlook 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 Outlook. 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 14.

#### 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 Outlook, 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 Outlook users in the Admin Console.

---

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

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You can set the authentication method used for Jive for Outlook 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 16.

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 15.
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 Outlook.

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 Outlook.

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`.

## 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 Outlook > Advanced**

---

If you have many users of the Jive for Outlook 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 16. For the list of features you can enable and disable, refer to [Client installation parameters](#) on page 12.

This feature is available from Jive for Outlook 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 Outlook > 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 for Jive for Outlook. You can use it to override authentication settings or to auto-populate the community URL for new users.

The script modifies the following registry keys:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Jive]
[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Jive]
[HKEY_CURRENT_USER\SOFTWARE\Jive]
[HKEY_LOCAL_MACHINE\SOFTWARE\Jive\DefaultServer]
[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Jive\DefaultServer]
```

### 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 14. 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

Key	Explanation
<b>Shared settings</b>	
<b>Jive instance URL</b>	The Jive URL for the client to connect to.
<b>Force authentication behavior override</b>	The authentication method to be used by Jive for Outlook.
<b>Disable HTTP header "Expect: 100-continue;" that passes automatically in POST requests</b>	<b>True</b> disables this header for specific cases where authentication troubleshooting is required.
<b>Don't suppress script errors in the browser control used to authenticate session-based/oAuth clients</b>	<b>True</b> displays script errors for troubleshooting purposes.
<b>Don't display the user's private container to clients</b>	<b>True</b> means that private folders like <b>Files Created by You</b> are not available when uploading files to Jive.
<b>Disable auto-update for all clients</b>	<b>True</b> prevents client machines from auto-updating, prevents polling requests from occurring, and removes all UI components that have to do with the feature.
<b>Outlook settings</b>	
<b>Disable Facebook social integration</b>	<b>True</b> disables connections to Facebook profiles.
<b>Disable Twitter social integration</b>	<b>True</b> disables connections to Twitter accounts.
<b>Disable LinkedIn social integration</b>	<b>True</b> disables connections to LinkedIn accounts.
<b>Disable Super Search</b>	<b>True</b> disables Super Search and makes all the results unavailable.
<b>Disable Convert To Discussion feature</b>	<b>True</b> disables the Convert to Discussion button.
<b>Disable the Social Bar</b>	<b>True</b> disables the social bar.

Key	Explanation
<b>Default Social Bar display mode</b>	The following options are available: <ul style="list-style-type: none"> <li>• Mini Social Sharing bar.</li> <li>• Full Social Sharing bar.</li> <li>• Social Sharing bar is disabled by default but can be enabled from the ribbon.</li> </ul>
<b>Disable status update</b>	<b>True</b> disables creating a status update from Outlook.
<b>Disable direct message integration</b>	<b>True</b> disables creating direct messages from Outlook.
<b>Disable private discussion integration</b>	<b>True</b> disables creating a private discussion from Outlook.
<b>Disable public discussion integration</b>	<b>True</b> disables creating a public discussion from Outlook.
<b>Disable 'Attach from Jive' and 'Upload Attachment' features</b>	<b>True</b> disables the ability to attach files from Jive to your email, and to post attachments from your emails to Jive.
<b>Disable notification mails appearing in specialized browser panel</b>	<b>True</b> disables JView by default. A user can re-enable it using the application <b>Settings</b> .
<b>Disable Producteev support in Outlook Client</b>	This setting is outdated and should not be used.

## Theming Jive for Outlook

You can use custom colors, images, and icons to provide a branded client experience of Jive for Outlook.

---

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

---

You can replace the Jive images and icons in the client application with your own branding. Users will see the updated theme as soon as they restart Outlook.

If you upgraded from a Jive for Outlook version earlier than 2.0, note that you'll have to recreate your theme.

You can modify:

- The colors used to style the Social Bar and the borders of various dialog boxes.
- The Jive icon that's shown in the Social Bar, the Accounts tab, and the filter menu.
- The Jive logo image that's shown at the upper right of the social bar, as well as when you create a status update or direct message.

---

**Note:** You can't remove the Powered by Jive logo.

---

To create a unified experience, you should update all of these items. You'll see a dynamic preview as you specify new branding elements.

To update the theme:

1. In the Admin Console, go to **System > Settings > Extended APIs > Theming** .
2. To change the theme color, type the name or hex code of a web-safe color.
3. To change the logo image, click **Choose File** next to **Logo image** and browse for an image.
4. To change the theme icon, click **Choose File** next to **Theme icon** and browse for an image.
5. Click **Update** to save your changes.
6. If you want to back out your changes, click **Reset Theme** to return to the default theme.

If you click **Reset**, you will have to start over and re-select all the elements of your theme.

# 3

## Using Jive for Outlook

---

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](#)
- [Posting discussions to community](#)
- [Posting status updates to community](#)
- [Sending direct messages to community users](#)
- [Converting email threads to discussions](#)
- [Marking content in Jive from Outlook](#)
- [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.

---

**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.

---

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 22.

## 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**

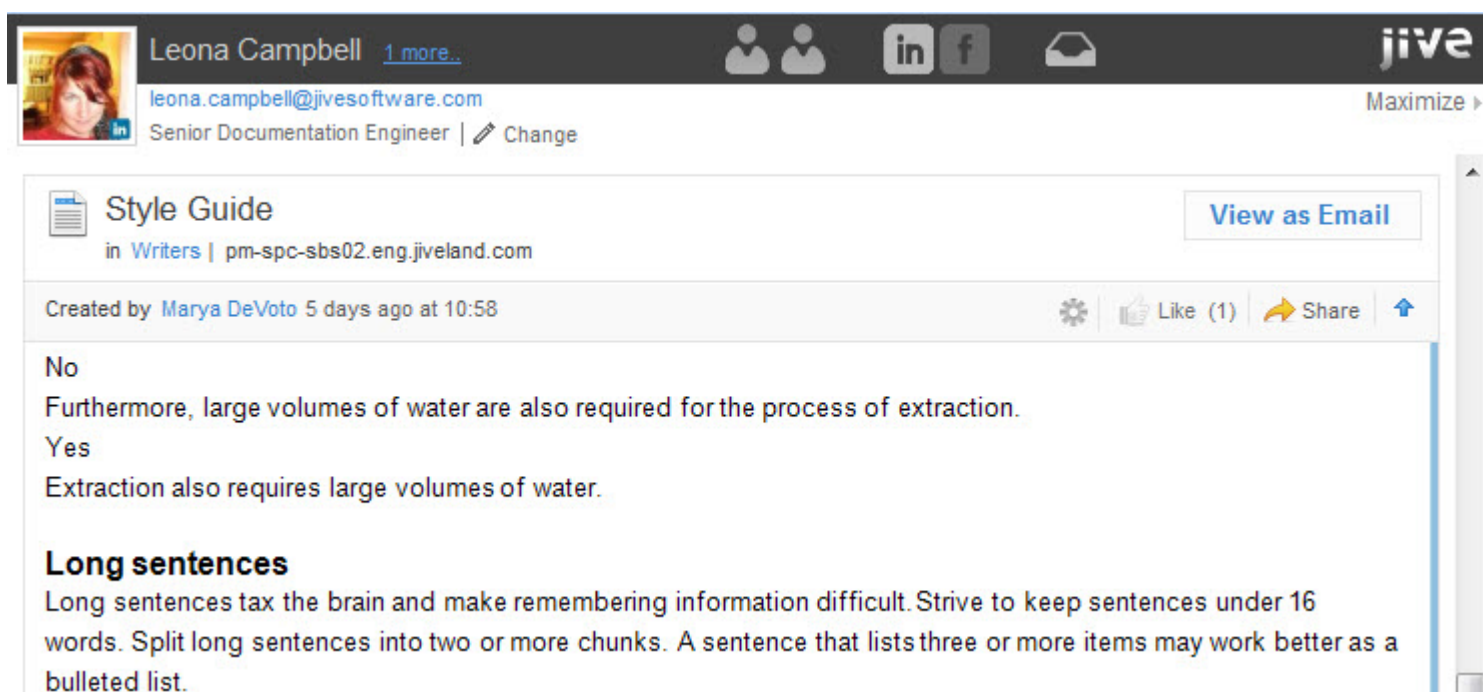
How about this: Have you authored content and wondered about the community reaction to it? Impact Metrics provides insight on how documents and blog posts are received by the community, including

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 26.



The screenshot shows the Jive for Outlook interface. At the top, there's a header bar with a user profile for Leona Campbell (Senior Documentation Engineer), social media icons for LinkedIn and Facebook, and a 'jive' logo. Below the header, a document titled 'Style Guide' is displayed, created by Marya DeVoto 5 days ago. The document content includes a 'No' section stating that large volumes of water are required for extraction, and a 'Yes' section stating that extraction also requires large volumes of water. A 'Long sentences' section advises keeping sentences under 16 words and splitting them into chunks. A 'View as Email' button is visible in the top right of the document view.

## 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:

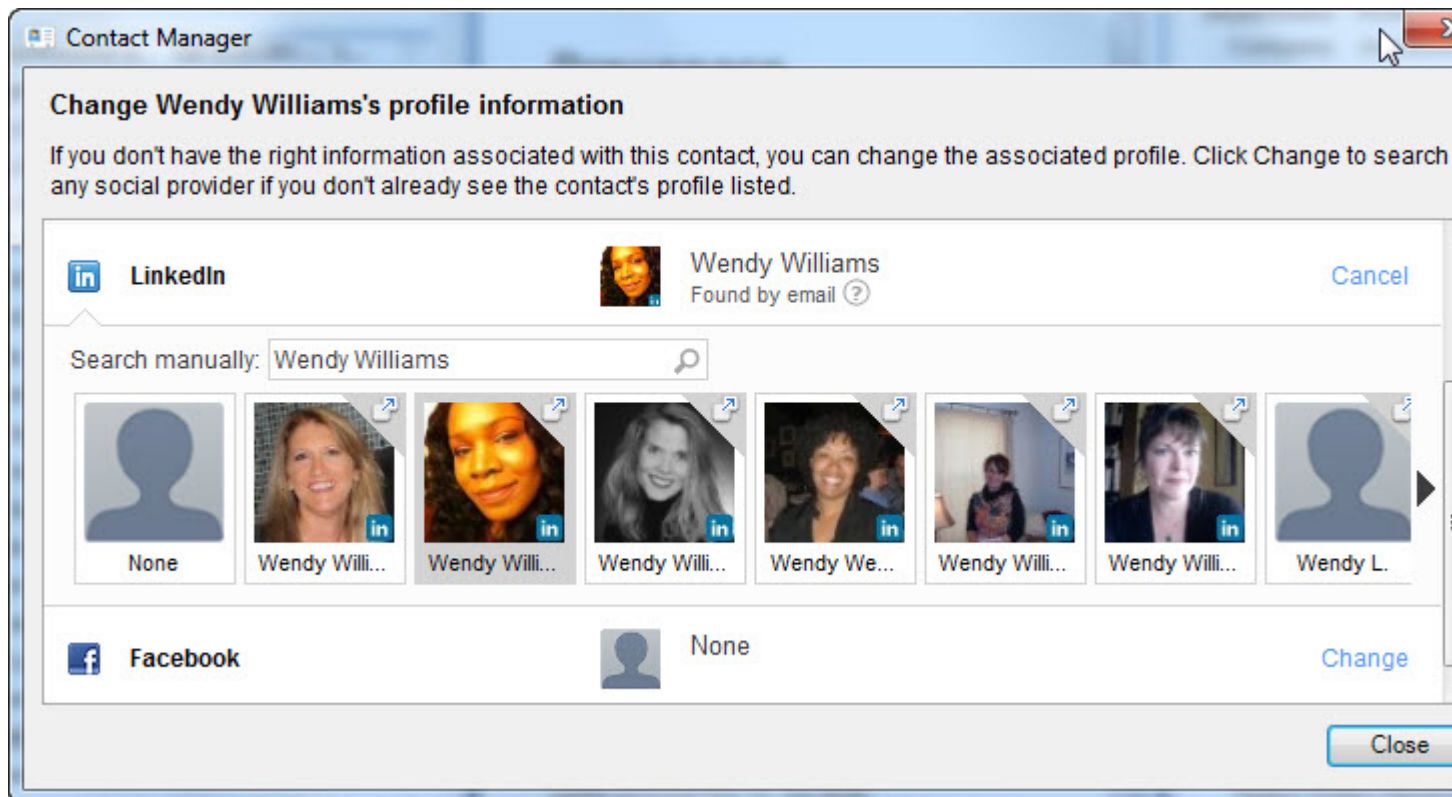
1. In the social pane, click **Change** under the user's avatar.

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 22.

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.

---

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

---

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.

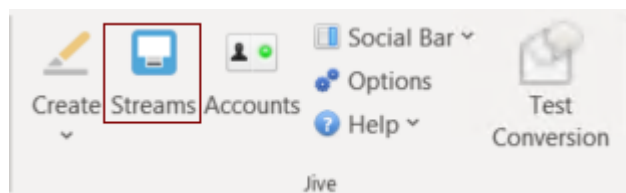
1. Click **Accounts** on the Jive toolbar.
2. Click **Add Account** and select a social network.
3. Provide your account credentials.
4. If you need to edit your credentials or use a different account, select the account and click **Gear icon > Edit** and re-enter the credentials.
5. If you need to temporarily 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**.

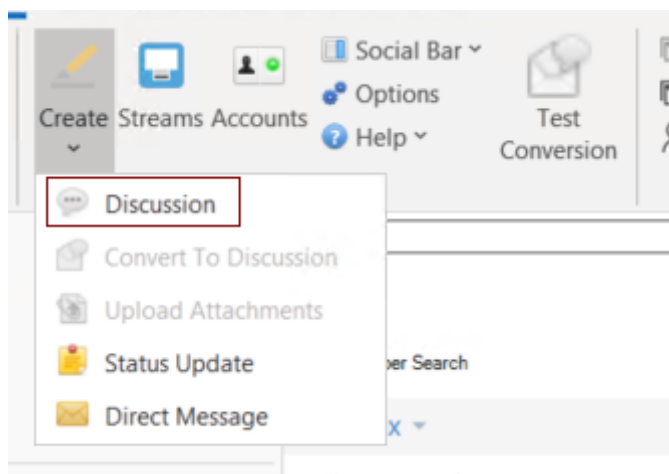
## Posting discussions to community

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**.

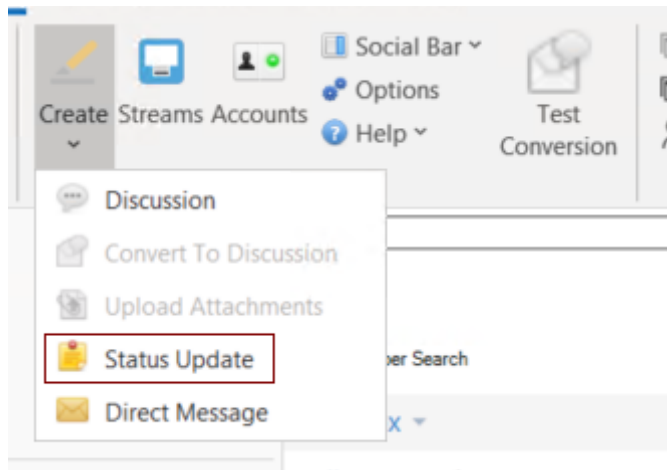
The discussion or question is published as you specified.

## 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.

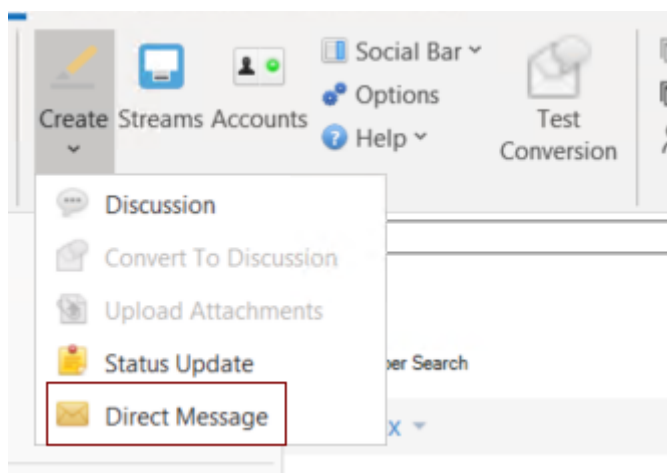
Your status is updated in the community immediately. It may not show up in the Outlook right pane until later.

## 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.

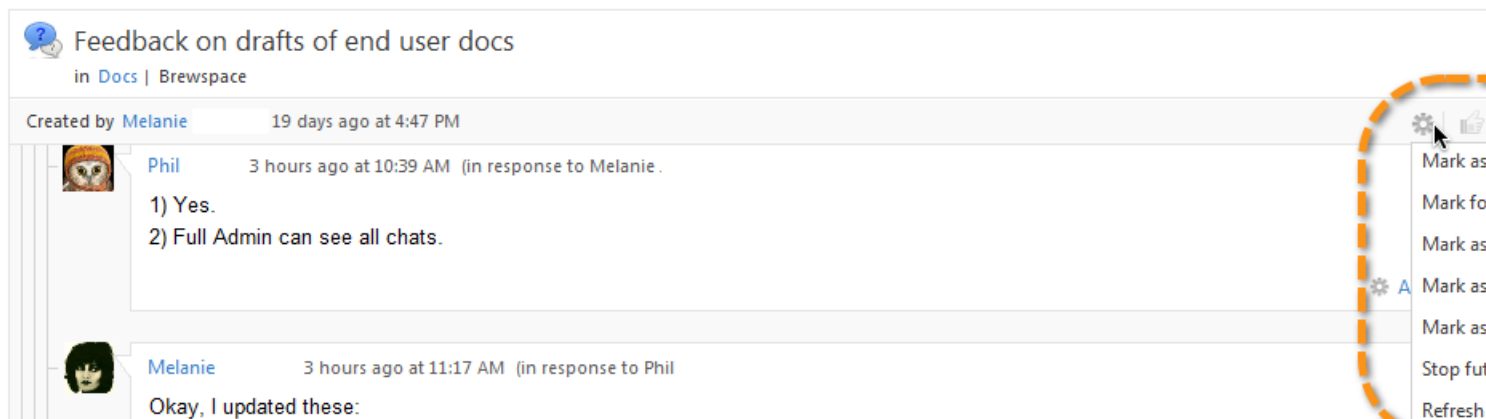


# Marking content in Jive from Outlook

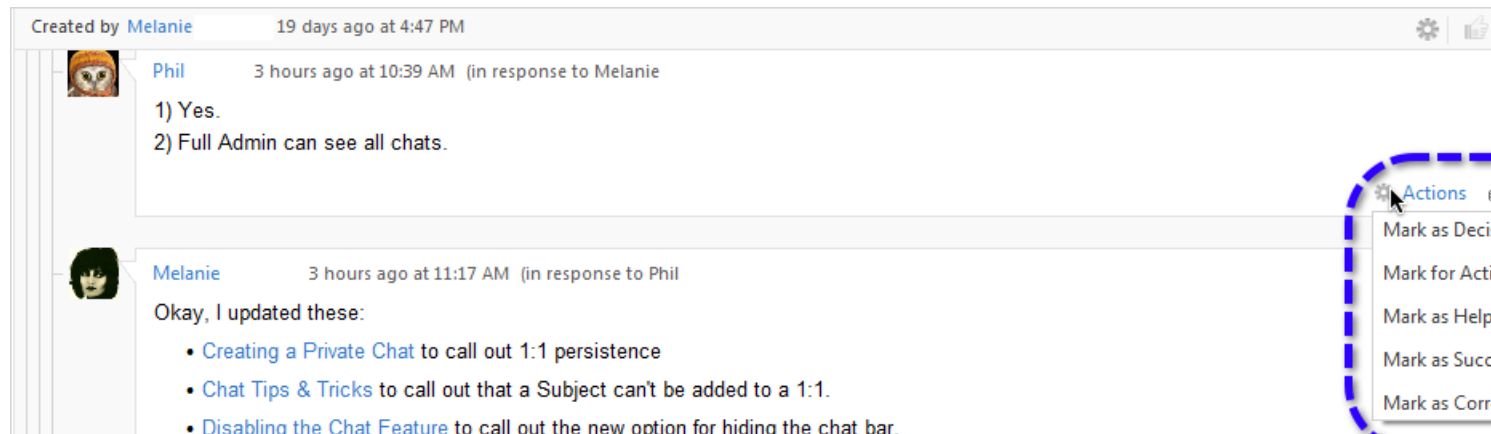
You can mark content as Final, for Action, Outdated, and so on, directly from Outlook.

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.

# 4

## 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:

- [Obtaining Jive for Outlook logs](#)
- [Resetting binaries](#)
- [Connection troubleshooting](#)

### Obtaining Jive for Outlook logs

Since Jive for Outlook 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 Outlook 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.

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**Note:** Don't use these settings without a recommendation from [Support](#).

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

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To reset the binary:

1. In the Admin Console, go to **System > Settings > Jive for Outlook** , 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 Outlook 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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## 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 7.