

The Jive logo consists of the word "jive" in a lowercase, bold, sans-serif font. The letter "j" has a distinctive hook that extends downwards and to the left.

work better together™

for Outlook

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8.0 Help for Community Managers

Release Notes

New in This Release

This new version of Jive for Outlook adds the following functionality:

- The ability to mark Jive content and comments for Action, as a Success, or as a Decision inside Outlook
- The ability to scan and view your custom streams inside Outlook

Administering Jive for Outlook

With the Jive for Outlook plugin, 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.

System Requirements

Make sure you have the correct versions of Jive and Microsoft Office to run the plugin.

The following describes the system requirements for installing the Jive for Outlook plugin. For setup instructions, see [Getting Set Up](#).

Software Prerequisites

- Jive 7.0.0 or higher.
- Microsoft Outlook 2007, 2010, or 2013 on a Windows operating system. For client requirements, see the Jive for Outlook end user documentation.

Installing the Plugin

You can install the Jive for Outlook server-side plugin from the Jive Software web site. After you add the plugin JAR, you'll need to restart Jive to make the Jive for Outlook plugin available.

Installing the Plugin

Install the plugin using the following steps:

1. If you have a version of the Extended APIs plugin earlier than v2.0, or if you have an earlier version of Jive for Office installed, you need to uninstall them before you can install the new Extended APIs. Check the Admin Console page at **System > Settings > Plugins**. If you have a Jive for Office plugin installed, you have the older version and need to remove it. After you remove the old versions and install the new plugin, you should see the new Extended APIs plugin in the Plugins page. If you still see the old plugin, try restarting the Jive server.
2. Before you install the Jive for Outlook plugin, make sure Advanced Email Tools are enabled in your Jive admin console. To enable this feature, go to **System > Settings > Email Server** and select the **Advanced Incoming** tab.
3. Go to the **System > Management > System Properties** tab.
4. Add a new system property called `extended-apis.outlook.mail.alias` and set the value to the server address or alias used to send Jive notifications. You can find this in the reply-to address of any notification email. For example, if the reply-to is `jive-23432-32423-234@my.email.com`, set the value to `my.email.com`.

5. Make sure Document Conversion is enabled by selecting **System > Settings > Document Conversion**.
6. Continue with the procedure in "Installing the JAR file."

Installing the Extended API JAR File

The Extended APIs plugin JAR file can be downloaded from the Jive Software web site. This plugin supports multiple Jive products including this one. After you add this plugin, you'll need to restart Jive in order for the feature to become available.

Once you download the plugin JAR file, install it using the following steps:

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

Client Installation

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

You can allow end users to install the client program manually from the Tools page in Jive or directly from `YourCommunityURL/artifact/download/outlook.exe`. You can also push the client to user desktops in either enabled or disabled mode. Download the MSI from `YourCommunityURL/artifact/download/outlook.msi`. (In earlier versions, the exe and MSI were found at `YourCommunityURL/office/download/` instead of `YourCommunityURL/artifact/download/`.)



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

- To enable/disable the Tools page (where the user will download the client) go to **System > Settings > Extended APIs > Desktop Applications**. Then select or clear the **Is Download Enabled** 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. `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.

- To install the client in disabled mode, so users must enable it using the toolbar button, use the argument `DISABLEATSTARTUP=1` when running the MSI.

Resetting the 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.

To get to these settings:

In the admin console, click **System > Settings > Jive for Outlook > Client Binaries**.

Updating Client Binaries

You can choose to update client binaries manually, or you can set them to be automatically installed on your server from the Cloud, so client users can always access the latest updates.

By default, Jive for Outlook alerts you by email when new client binaries are available, so you can decide when and whether to make them available on your server for users to download. However, you may not want to have to manually update them. Setting Jive for Outlook to auto-update the client software ensures that when a new client version becomes available, it is automatically updated on your server, and your users get prompted to download it. You can see a log showing when Jive checks for a new version or downloads one by checking the Auto-Update log at **System > Settings > Extended APIs > Auto-Update Logs**. You'll also receive an email alerting you when an auto-update completes.



Note: If you use SSO or reverse proxying in your environment, you can't use auto-update until you exclude the following URL(s) from authentication (depending on whether you use both Jive for Outlook and Jive for Office):

- `SERVER_URL/office/download/outlook.msi`
- `SERVER_URL/office/download/office.msi`

To enable auto-update:

1. Click **System > Settings > Extended APIs > Desktop Applications**
2. Set updates to Automatic. When new client updates come through, you will no longer see the notification buttons next to the client binaries version(s), because you will always have the latest version of the client software.

Choosing an Authentication Method

Your authentication method will depend on the required balance between user security and convenience.

You have several options for user authentication with Jive for Outlook. 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 details on configuration, see [Setting an Authentication Method](#).

Basic Authentication

With basic authentication, credentials are saved locally and passed in Base64 format with each http request. This method is the most convenient (because credentials only need to be provided once), but the least secure.

Session-Based Authentication

Session-based authentication saves credentials using a cookie, which expires 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

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. 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 Office tab of the user's Preferences page (accessed from the menu under the user's name). This method best balances security and convenience.

Setting an Authentication Method

You can set the authentication method for Jive for Outlook users by going to **System > Settings > Jive for Outlook > Advanced**.

You can set the authentication method used for Jive for Outlook in the Advanced tab. For information about choosing an authentication method, see [Choosing an Authentication Method](#). The default setting, and the recommended authentication method for most users, is OAuth.



Note: 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.

To set your authentication method:

1. Go to **System > Settings > Extended APIs > Desktop Applications**.
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](#).

Enabling OAuth

You can choose OAuth as your 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`.

Theming Jive for Outlook

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

The Outlook Theming tab lets you 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 recently 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. Go to **System > Settings > Jive for Outlook > Theming**.
2. To change the theme colors, type the name or hex code of a web-safe color.
3. To change images, click **Choose File** for any of the images. Note that hovering over the text describing any image highlights that element in the preview.
4. Click **Update** to save your changes.
5. If you want to back out your changes, you can return to the default theme by clicking **Reset Theme**. When you click **Reset**, you'll have to start over and re-select all the elements of your theme.

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 in HKEY_LOCAL_MACHINE\SOFTWARE\Jive or HKEY_CURRENT_USER\SOFTWARE\Jive. For a list of the keys and what they control, see [Remote Client Customization Reference](#).

To see a list of features you can enable and disable, refer to [this document in the Jive Community](#). Note that you must be a registered community user to see this document.

Note that changes you make to HKEY_CURRENT_USER will always override the settings in HKEY_LOCAL_MACHINE.

You can select which features to enable and disable in the admin console and then generate a script using the following steps:

1. Click **System > Settings > Jive for Outlook > Advanced**
2. In the Shared and Outlook sections, select the settings you want to propagate to the client.
3. Click **Generate**.

Specifying Client Connection Behavior

By default, Outlook detects any SSO configuration and allows clients to connect accordingly. However, as of version 5.0.1.2, you can override this behavior as part of Remote Client Customization.

The Jive for Outlook client typically auto-detects your Jive SSO configuration. If you want to specify how clients should connect, you can use Remote Client Customization to create an administrator script that modifies the registry. This customization will also affect Jive Connects for Office for any users who have it installed. To create a script that sets the SSO connection method on the client:

1. Click **System > Settings > Jive for Office > Advanced**
2. Select the **Force authentication behavior override** check box.
3. Select **Force session-based authentication login** to enforce using the Jive SSO implementation. Session-based authentication is more secure, but requires users to provide credentials more frequently. Select **Force basic authentication** to enforce that clients connect using basic authentication by username and password. This method is more convenient, but less secure.