



Microsoft®

# SharePoint® 2010

## Making SharePoint Social White Paper

Why Combining SharePoint Plus Jive is the Next Evolution of Enterprise Software

*Version and Date Published: Version 1.0.6, February 2013*

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## Summary

Geoffery Moore, author of [Crossing the Chasm](#),<sup>1</sup> writes about the future of Enterprise IT in an AIIM white paper entitled [A Sea Change in Enterprise IT](#).<sup>2</sup> He describes two distinct system types, systems of record and systems of engagement. He explains why having only systems of record inside the enterprise is holding back the potential for progress and how the next evolution is to embrace systems of engagement. In this white paper, we will pick up where Mr. Moore left off and discuss in further detail how combining SharePoint, arguably one of the most popular systems of record, with Jive SBS, the leading system of engagement is quickly becoming the next evolution in enterprise software.

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<sup>1</sup> "Crossing the Chasm," *Wikipedia*, accessed September 27, 2011, [http://en.wikipedia.org/wiki/Crossing\\_the\\_Chasm](http://en.wikipedia.org/wiki/Crossing_the_Chasm).

<sup>2</sup> "Systems of Engagement and the Future of Enterprise IT: A Sea Change in Enterprise IT," *Association for Information and Image Management*, accessed September 27, 2011, <http://www.aiim.org/futurehistory>.

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## Why This White Paper

With well over a 100 million licenses sold and adding 20,000 new SharePoint users a day,<sup>3</sup> SharePoint has grown to be Microsoft's most popular platform. A part of this success has come from the ecosystem of offerings that help extend SharePoint in key areas. These extension points arise either because SharePoint doesn't have certain capabilities or where SharePoint's capabilities need to be extended to provide a workable solution. In this white paper, we are going to focus in particular on social features, an area of growing importance to innovative enterprises.

One of the imminent risks with SharePoint implementations is that over time SharePoint becomes just another place to store documents, and is nothing more than a glorified file share with a web-based interface. Today's collaborators are looking for more than just a place to store documents; they are looking for a place to interact. They want a place to engage one another. They want to share more than documents: ideas, questions, videos, blogs, links, comments - the types of things they've gotten used to sharing when they interact with their friends and family with Facebook or Google+. Users want a social experience at work, but they don't want to share pictures of what they had for dinner last night; instead they need to share information that helps get work done faster – think RFPs, training videos, company announcements, competitive analysis, and more. Social business is about conversations, connections, and awareness. It's about the unstructured work required to be effective. Although there are "social features" like discussion boards, blogs, and wikis in SharePoint, the word on the street is that they lack the necessary functionality and are too difficult for the typical user to engage; therefore they are not used.

Because of this, a number of different options have emerged to improve the user's experience with SharePoint, especially as it relates to social features. In this white paper, we'll look at those options and learn some of the pros and cons of using different solutions to address the missing social experience in SharePoint. We'll even look at the option of "building" these features into SharePoint. Since this is a white paper by ThreeWill, the leading social systems integrator, we'll share in detail background information on Jive and SharePoint; what Pointer for Jive is about; what we've learned so far from using Pointer for Jive in the real world; and address some misconceptions about using SharePoint and Jive together. Upon reading this white paper, you'll be better informed about how to address the growing need for social features inside your enterprise. You'll also have the next steps that you can take to add key social features to your enterprise with a combination of SharePoint and other solutions.

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<sup>3</sup> Mary Jo Foley, "Microsoft: We're adding 20,000 new SharePoint users a day," *ZDNet* (blog), March 24, 2011 (1:53pm PDT), <http://www.zdnet.com/blog/microsoft/microsoft-were-adding-20000-new-sharepoint-users-a-day/9011>.

## Audience for this Paper

The primary audience for this white paper is business decision makers for mid-size to large enterprises. The content is targeted towards enterprises looking to:

- Get more out of their SharePoint investments.
- Drive productivity and innovation by engaging their social, mobile workforce.
- Make it easier for employees to create, share, and find the people and information needed to get work done and make decisions faster.

The secondary audience comprises technical decision makers including CIOs, software architects, and other enterprise technology leaders. Certain sections in this paper are technical in nature to provide pertinent details to assist decision-making.

Finally, other audiences that will benefit from reading the paper include:

- Product companies and ISVs interested in SharePoint and Jive.
- Senior management at enterprises interested in learning more about using SharePoint and Jive together.
- Anyone interested in learning how to use the latest in social business technology in light of current technology investments.

Though a background in Jive and SharePoint is beneficial for the audience member, it is not a requirement. There are specific sections in the white paper that cover the backgrounds and the basics of the two products.

# SharePoint Backgrounder

## History

It's easy to forget that PCs began as islands of information with no effective means of sharing or collaborating (sneakernet, anyone?). The earliest installations of LAN Manager and Netware provided the foundation for shared network folders and printers to provide the most primitive forms of collaboration around documents.

Fast-forward to the mid-to-late 90's and the advent of web-based technologies. More and more companies and departments looked to use web sites to convey information internally and externally. Given that the provisioning of websites and the creation of content fell largely to an already overwhelmed IT staff, the need arose for user-driven creation of sites and content.

It is from this background that SharePoint arose. At a simple level, SharePoint in its earliest forms provided a mechanism for users to provision web sites, create content, and then collaborate on that content. These sites became known as *Portals* in the SharePoint world.

## Evolution of Core Features

From the very start, SharePoint has been about collaborating around *lists* (much like a database table or spreadsheet) and *libraries* (much like a sophisticated network folder). Over time, other features have been added to meet business needs. One such feature is a *Workflow*. In simple terms, a workflow is a way to enforce a business process around a document or a list item. For example: a company may have a three-step, manual approval process for expense reports. A SharePoint workflow can automate that process by sending emails to notify approvers, and then gathering their responses to ultimately approve or reject the expense report.

SharePoint also has had *Search* as a foundational part of its evolution. As sites and libraries proliferated, users found it more and more difficult to locate the data they were looking for. While SharePoint search has evolved over the years to meet the increasingly complicated demands of searching for content, SharePoint 2010 search reaches the apex of its growth with the inclusion of two new features: *refiners*, which allow users to quickly filter results based on document type, author, or other criteria; and the improvement of people-related data in search results to facilitate finding the correct people and skills needed to solve a problem.

## Advanced Enterprise Features

Another important aspect in the evolution of SharePoint is that of *Enterprise Content Management* (ECM). ECM may also fall under the more specific terms *Document Management* or *Records Management*. As companies operated in an increasingly litigious business environment that also included regulations such as [The Health Insurance Portability and Accountability Act of 1996](#)<sup>4</sup> (HIPAA) and [The Sarbanes–Oxley Act of 2002](#),<sup>5</sup> it became critical for electronic “documents” to be stored, managed, retained, and disposed of with the same sort of formal, rigorous guidelines that had been used for years on paper documents. SharePoint 2010 provides content and records-management facilities that use a rules-based mechanism to guarantee that user-uploaded documents are routed to the correct libraries for storage and, upon arrival in those libraries, the documents are retained and ultimately destroyed according to company document policy.

Another major influence that has shaped SharePoint is the rise of *Social Networking*. Many individuals began to realize that Facebook and similar sites represented an interesting, innovative, and effective way of communicating with friends, and many wanted to bring this same kind of effective communication within the corporate walls. SharePoint addressed these social networking influences with several features, including an improved User Profile infrastructure that acts as a foundation for locating and collaborating with relevant or qualified individuals within the organization; inclusion of people in search results; and enhanced collaboration and sharing through *My Sites* personal sites.

A final influence on the evolution of SharePoint falls in the area of *Business Intelligence*. Companies have increasingly found themselves in a complicated business environment where executives and decision makers need to be able to quickly access and view data that will allow them to take the pulse of the company and make key decisions. *PerformancePoint Services*, a part of SharePoint, has evolved over several releases to provide *Dashboard* capabilities (also sometimes known as *Mash-ups*) to pull together and present critical information that will allow company leaders to make informed decisions.

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<sup>4</sup> “Health Information Privacy,” *US Department of Health and Human Services*, accessed September 27, 2011, <http://www.hhs.gov/ocr/privacy/>.

<sup>5</sup> “Sarbanes–Oxley Act,” *Wikipedia*, accessed September 27, 2011, [http://en.wikipedia.org/wiki/Sarbanes-Oxley\\_Act](http://en.wikipedia.org/wiki/Sarbanes-Oxley_Act).

## Product Capabilities – Going Deeper

When attempting to understand SharePoint in its current form, the “SharePoint wheel” is a good place to start.<sup>6</sup>



Figure 1 - SharePoint 2010 Wheel<sup>7</sup>

### Sites

SharePoint sites are the central point of collaboration. The full set of features in SharePoint 2010 Sites can help end users build a site from start to finish. Several out-of-the-box features provide instant value by helping a site owner build the first page right away. Still other features make it simple to modify pages—change content, add interaction, or apply a design theme. Novice or expert, anyone can quickly create, customize, and publish a site that looks great and meets a specific business need.

Sites are also easy use thanks to an updated user interface that includes the Microsoft Office-style ribbon and AJAX-style interactions for fewer page refreshes. Tight integration to Microsoft Office makes it easy to save documents directly to SharePoint sites. Microsoft SharePoint Workspace provides offline access to sites, documents, and lists as well as synchronization upon reconnect.

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<sup>6</sup> For an interactive wheel and drill into capabilities, go to

<http://sharepoint.microsoft.com/en-us/product/capabilities/Pages/default.aspx>

<sup>7</sup> From [http://en.wikipedia.org/wiki/File:Sharepoint\\_wheel.png](http://en.wikipedia.org/wiki/File:Sharepoint_wheel.png). Used with permission from Microsoft. Of course, this wouldn't be a white paper on SharePoint without this graphic...

Sites gives people the content they need, the way they want it. Features such as audience targeting allow publishers to target interested readers. Social tagging allows the community to collectively catalog and emphasize important content.

## Communities

The SharePoint 2010 collaboration platform is secure, easy to manage, and scalable. People can work together more safely with the platform's granular security and privacy controls, centralized policy setting, and detailed reporting and analysis.

SharePoint 2010 provides a single collaboration platform that lets people use the tools and applications they already know with the strong integration to Microsoft Office. Adherence to open standards such as Open Search allows for integration with other systems. *Business Connectivity Services* provides an easy mechanism to surface information from other business applications, including full support for create, read, update, and delete.

## Composites

Non-programmers can use the building blocks of SharePoint 2010 to build custom solutions. SharePoint 2010 Composites may include data from other systems as if it lived in SharePoint with full create, read, update, delete, and search capabilities.

Composites also allow IT departments to deal with the issue of IT sprawl where end users create their own Access-based and Excel-based solutions. These solutions can now be centralized, managed, and deployed from SharePoint. Composites also limit IT exposure to errant or malicious code through the use of Sandboxed Solutions.

## Content

SharePoint 2010 Content makes *Enterprise Content Management (ECM)* accessible for everyone. SharePoint combines traditional concepts of formal document and records management with social features such as tagging. Users are able to use SharePoint as they always have without having to specifically be aware of following records management rules. In cases where other document management systems are found in the enterprise, interoperability standards like CMIS, XML, and REST permit integration with legacy ECM systems.

## Insights

SharePoint 2010 Insights allows business stakeholders to access the business information they need to make good decisions. With powerful features like interactive dashboards and scorecards, people can use the information in databases, reports, and business applications to address specific needs.

Even better, they can work naturally and confidently, thanks to a familiar user experience. Because SharePoint 2010 Insights uses well-known applications and interfaces, people are



comfortable from the start, and they know how to get the data they need. For example, anyone can use Excel Services to publish Microsoft Excel workbooks in SharePoint 2010. From there, an entire team can access and analyze the same data and rest assured that everyone has the right information.

## Search

SharePoint 2010 Search isn't just about finding a particular document; it's about finding the information and *people* needed to get the job done. Search results not only present matching documents but also relevance about who created those documents. In addition, SharePoint search provides *refiners*, an easy way to cut the clutter on search results by quickly filtering results based on document type, author, and other criteria. Finally, SharePoint search provides a customizable environment for presenting search results to users in a way that best fits their needs.

## SharePoint on Internet Time

While SharePoint presents an impressive list of features, it also represents a monolithic, slow-release-cycle product model that is in contrast to constantly updated products such as the Google Chrome browser, Facebook, and other apps that operate on "Internet time". Microsoft's response to social networking is a good example of this: when Microsoft released SharePoint 2007 social networking as we know it barely existed; however, by the time SharePoint 2010 arrived social networking was firmly entrenched and, in some respects, the SharePoint social features wound up having a "me-too" feel about them. SharePoint's slow, deliberate release cycle allows it to provide strong, solid, reliable enterprise-class features such as workflows and document management that "Internet time" apps might not have; however, on the other hand, SharePoint isn't able to nimbly respond to emerging trends and needs as quickly as some competing products.

## Conclusion

SharePoint is a mature, solid platform for Enterprise Content Management. It provides users with the power and freedom to create and integrate sophisticated content without intervention from IT. It suffers from the limitation of a slow release cycle and social features that have a bolted-on feel to them.

SharePoint is really good at document management, and has extremely mature features for this, especially with 2010. While they have attempted to add social features, it's clear that social is not at the core of the product—Microsoft has added facilities for tagging, rating, commenting, etc. in way that allows them to "check the box" but in no way accounts for a user's natural workflow in using these tools. One example: you can leave a post on someone's wall, but no one can respond to it or like it—they have to go back to the original poster's wall and add a completely disconnected comment. SharePoint was never built as a system of engagement, and is probably never going to excel at being one.

# Jive Backgrounder

## History

Whereas SharePoint's lineage began as a response to a better solution to the network share and small team collaboration, Jive's beginnings are in connecting and engaging people. Specifically, they started with external communities that began to give customers a voice (at this time their product was called Clearspace<sup>8</sup>). This enabled a means to communicate not only to the companies they purchased products or services from but also influence other potential buyers. In this world, the intuitive interface and the simplicity of sharing rule.

Jive's rapid progress in external communities turned inward to translate these benefits to company intranets to enable collaboration between departments and different locations. With this move there becomes a need to integrate with existing platforms --- platforms like SharePoint. As SharePoint reacts to emergence of social, Jive is able to capture and drive innovation in most-needed features. Since we usually see SharePoint deployed for internal use, the items below focus on the features of Jive that focus on engaging employees (rather than customers, partners, or other external constituents).

Jive, at its simplest level, provides a means to find people and information faster by making it easier to initiate conversations, raise awareness and communicate status.

## Evolution of Core Features

From Jive's start there has been a focus on fostering the informal collaboration required to be successful. Jive has also filled out other features to meet demanding needs from business communities. Jive provides rich social collaboration to users while taking control of unsanctioned services like document sharing sites and micro blogging tools. Jive is an enterprise-hardened social business platform that empowers collaboration without compromising IT values and controls. Unlike rigid document repositories, intranets and portals, Jive is an engaging social platform that lets users find information, share ideas, and use innovative business apps.

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<sup>8</sup> Read more about the evolution from Clearspace to Jive Engage.  
<http://www.jivesoftware.com/products/beyond/clearspace>

## Key Business Needs Addressed By Jive

Here's a look at the key business needs we hear from our SharePoint customers that are addressed by Jive.

### Increasing Workforce Productivity

**Business need:** Make it easier for a distributed, mobile workforce to find the information they need (people, content, expertise) in order to get their jobs done faster.

**What Jive delivers:** Jive increases productivity by reducing the amount of time knowledge workers spend looking for information. Whether on their desktops or mobile devices, Jive delivers relevant information to your users based on relationships, interests, and needs so they get the information they need, wherever they are.

### Capturing and Sharing Institutional Knowledge

**Business need:** Capture, centralize and share institutional knowledge that is locked away in hard-to-reach places (e-mail, desktops, SharePoint sites, etc.).

**What Jive delivers:** Jive drives collaboration and increases productivity by unlocking institutional knowledge. Jive makes it simple to get information off of PCs and out of inboxes into a place where conversations, ideas, and important document contexts are captured and become a vital part of collective business knowledge.

### Engaging Employees

**Business need:** Intranet/portal sites are outdated silos of information that need to be redesigned to engage employees.

**What Jive delivers:** Jive engages the knowledge working by relieving the user of the burden of visiting multiple sites looking for information and replacing that functionality with an application that employees actually enjoy using. Unlike rigid document-centric and process-heavy intranets and portals, Jive is an engaging social business platform that lets users forge meaningful business relationships, find information and expertise, and share ideas.

### Balancing Innovation with Control

**Business need:** Foster innovation while maintaining necessary enterprise controls to keep users away from unsanctioned, external services (such as document sharing or micro-blogging sites).

**What Jive delivers:** Jive delivers the functionality of these external sites in a centralized, easy-to-use package. In addition, the [Jive Apps Market](#)<sup>9</sup> lets you deploy hundreds of social applications while maintaining necessary controls. Jive reduces risk of leaking proprietary information by replacing unauthorized Web 2.0 tools with an enterprise-grade social business platform.

Jive addresses the above business challenges with leading social business technology. For a more comprehensive list of capabilities you can [visit Jive's site](#),<sup>10</sup> but we've summarized what Jive's clients view as the key features here.

## Other Jive Key Capabilities

### (User) Experience Matters

Whether it is accessed through a browser, a mobile device, or through desktop tools like Office or Outlook, Jive is an app that emphasizes a positive user experience. Jive customers like [CSC report more than 90% adoption across more than 90k employees](#).<sup>11</sup> This unparalleled user experience insures a high adoption rate in the enterprise.

### Filter Out Noise, See What Matters

Jive [What Matters](#)<sup>12</sup> provides a unified view of all the information a worker needs, including relevant communications and conversations, the actions to be taken, and the recommendations that can't be missed. Plus, Jive What Matters intelligently tunes the stream of information - amplifying the most important items while reducing the noise of irrelevant information. The result: users get the information and connect with the people they need to make decisions and get work done.

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<sup>9</sup> "Jive Apps", *Jive Software*, accessed September 27, 2011, <http://www.jivesoftware.com/products/apps/>.

<sup>10</sup> "Jive Social Business", *Jive Software*, accessed September 27, 2011, <http://www.jivesoftware.com/>.

<sup>11</sup> Claire Flanagan, "Beyond the Field of Dreams: Building a Successful Social Business Strategy," *Computer Sciences Corporation*, May 2011, <http://www.slideshare.net/cflanagan17/csc-case-studyjboye11final>.

<sup>12</sup> "What Matters," *Jive Software*, accessed September 27, 2011, <http://www.jivesoftware.com/products/what-matters>.

## Consumerization of IT<sup>13</sup>

Jive Apps Market provides innovative, engaging apps for any business need without extensive coding or complex deployment. Plus, with Jive Apps, IT can provide simple, social interfaces into legacy applications and rapidly deploy simple apps that meet ever-changing business needs. The permission to innovate is delivered, without compromising IT values and controls.

## Jive on Internet Time

Jive's release cycles have traditionally been in terms of months, rather than years like SharePoint. This allows Jive to capture many of the popular trends in social software and drive a leadership position in three of Gartner's quadrants (Social CRM, Social Software for the Workplace, and Externally Facing Social Software).<sup>14</sup> They have also been recognized by the Forrester Wave for their innovative products<sup>15</sup>.

## Conclusion

Jive's background is in building successful internal and external communities and makes it a compelling choice for enterprises looking to address key challenges like increasing the productivity of their mobile workforce, capturing corporate knowledge, engaging employees, and accomplishing the difficult task of balancing innovation and control. Jive is loved by the business and users because of its elegance and refinements of social features through the years. Analysts agree, as attested by the number of Gartner quadrants where Jive is considered a leader.

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<sup>13</sup> David F. Carr, "Jive Apps Seeks Enterprise Rigor, Consumer Cool," *Information Week*, July 29, 2011,

[http://www.informationweek.com/thebrainyard/news/social\\_networking\\_private\\_platforms/231002923](http://www.informationweek.com/thebrainyard/news/social_networking_private_platforms/231002923)

<sup>14</sup> Download analyst reports from

<http://www.jivesoftware.com/resources/analyst-coverage>

<sup>15</sup> The Forrester Wave: Enterprise Social Platforms, Q3 2011,

<http://www.jivesoftware.com/resources/analyst-coverage/access-forrester-2011-wave>

# Why SharePoint Plus Jive

## ThreeWill's Take on the Situation

Enterprises have come to understand that there is a new way to do business with social business software. They recognize that decisions require a collaborative effort and not every decision can be modeled with a structured business process that only consists of a document and a structured workflow.

Since the inception of ThreeWill, we've been talking to clients about structured vs. unstructured work. We believe that our successful clients are the ones that enable their workforce with tools for both types of work. And that's why we believe enterprises are choosing to use Jive with SharePoint.

At ThreeWill, we love our analogies (seems like a favorite pastime for us – [SharePoint is like butter](#).<sup>16</sup> [SharePoint is like sugar](#).<sup>17</sup> [Is your SharePoint like MySpace?](#)<sup>18</sup>). One of the most popular analogies for SharePoint is SharePoint 2010 is that it's like a Swiss Army Knife. It does all sorts of things. It has document management, workflow, electronic forms, and business intelligence to name a few of the tools that can be flipped out of this Swiss Army Knife. As we described in the SharePoint Fundamentals section, these capabilities are grouped into 6 areas of the platform: Sites, Communities, Content, Search, Insights, and Composites.

So, if we use the Swiss Army Knife as the analogy for SharePoint, then Jive is best represented by a Bowie knife (**See Appendix A**). Both have some common, overlapping features; both can, in theory, be used for similar purposes; but there are certain things that call for a targeted, specific solution. Just as a Bowie knife is a targeted solution for certain needs, so Jive is targeted sharply to implementing social business interaction.

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<sup>16</sup> John B. Underwood, "SharePoint is like Butter," *ThreeWill*, September 30, 2010, <http://www.threewill.com/2010/09/sharepoint-is-like-butter/>.

<sup>17</sup> Pete Skelly, "SharePoint is like Sugar," *ThreeWill*, March 1, 2011, <http://www.threewill.com/2011/03/sharepoint-is-like-sugar/>.

<sup>18</sup> Bo George, "Is your SharePoint like MySpace?" *ThreeWill*, July 20, 2011, <http://www.threewill.com/2011/07/is-your-sharepoint-like-myspace/>.

## Overlapping Social Features in SharePoint and Jive

If SharePoint has social features, then why advocate a blended Jive/SharePoint environment? Why not just use SharePoint for everything?

The short answer is that while SharePoint is great for structured work (document storage, workflows, rules enforcement), it is really lacking in supporting the unstructured communications that make up 80% of the workday. That's why we've seen so many third-party tools appear for socializing SharePoint (see "Other Options for Socializing SharePoint" section later in this document).

Digging a little deeper, we see that SharePoint has social features and APIs, but is not a *social software solution*. Jive provides the enterprises a true social software solution that drives high adoption with a user experience that end users have come to expect based on their experience with public domain websites like Facebook, LinkedIn, Amazon, etc. They design their user experience around engaging people, in this case, employees so they can find the information and people they need to make decisions and get work done faster.

A user's expectation of what constitutes a good user experience is a bar that is raised on almost a monthly basis. The challenge for SharePoint is to keep up with the development cycles to keep the user interface current and the engineering that goes into a focused social solution.

Jive is in the business of nailing social business collaboration and making that their core competency. Getting social right is not just having a pretty user interface, it requires some backend engineering along with knowing what you should and should not design into the product. You see this engineering focus of applying the 80/20 rule to how they do social in their latest platform in Jive. Providing "What Matters" to users for their "Activity, Communication, and Actions" is a winning idea and this focus on making software easy and fun to use has been key to their growth and adoption to their Jive product.

The combination of Jive for social conversations and SharePoint for structured document and list management yields a strong enterprise social solution.<sup>19</sup>

Jive allows for a finely tuned social experience and SharePoint facilitates the structured document management and workflow that is necessary to today's enterprises. Jive provides the user an enterprise-grade social experience for discovering, acting and collaborating around enterprise data (structured and unstructured).

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<sup>19</sup> Jennifer Bouani, "Jivin' With SharePoint Connector," *Jive Community* (blog), Jul 29, 2010 12:26:24 PM, <https://community.jivesoftware.com/community/business-conversations/blog/2010/07/29/jivin-with-sharepoint-connector>.

## Jive is Not a Replacement for SharePoint & Vice-Versa

This statement might be controversial (depending who you are talking to, especially if it is your Jive or Microsoft sales representative). Jive realizes that the user's content will not always be in Jive and therefore they need to connect to other enterprise software systems like SharePoint and need that integration to be bidirectional, tightly integrated, and secure. Because of SharePoint's presence and it being a key repository for enterprise content, Jive and ThreeWill made a strong commitment to properly integrate with SharePoint. This investment has taken time (active development close to four years) and is ongoing.

## Typical Customer Comments About SharePoint & Jive

We asked a few customers to provide thoughts on why they use Jive and SharePoint together. This is pretty representative of what we hear from most customers.

*"PGi has invested significantly in both Jive (our PGiLife Intranet) and SharePoint (PGiDocs). Jive shines in the social aspect around conversations, feeds, and sharing / growing knowledge across our 1700 associates. Jive, however, doesn't offer a great way to store, share and collaborate on documents, but this is where SharePoint excels. To put it simply, we live in PGiLife (Jive), we store in PGiDocs (SharePoint). We need them to work together."*

**Scott Schemmel, VP, Global Information Technology, PGi**

*"We use Jive to enhance communication and collaboration among our 13,000+ employees. SharePoint is used for teams requiring additional functionality such as increased document management, customized lists/calendars/polls, workflows, and InfoPath related features. Integrating the two products has provided us with a more seamless intranet experience for our users."*

**Charles McCann, Software Development Manager, Manheim**

*SharePoint provides about 80% of the functionality you need for social business, but it's like having 80% of a bicycle, which, since you can't ride it, is very similar to having no bicycle at all. On the other hand, Jive specializes in being a system of engagement, and is specifically built to work tools into the natural workflow that people are already using. Yet, Jive does not pretend to be and seems to have no intention of becoming a document management system—doing so would take them away from their core business, which is to provide a fantastic system of engagement on a rapid release cycle. That's why you need both: SharePoint for its mature, feature-rich document management system, and Jive for a mature, feature-rich social platform.*

**Nicole Bussard, Senior Manager - Business Consulting, Sapient**



The message is a) both Jive and SharePoint bring unique value to the organization, and b) having them work together and not in silos is key to the overall success of building a dynamic infrastructure.

## Understanding Pointer for Jive

### Overview

Pointer for Jive is a bi-directional connector that adds value to the SharePoint and Jive user experiences. The nature of the connector is to merge SharePoint content management features with the social competency of Jive.

You can look at the integration from the perspective of:

- Activity Streams
- Documents
- Social
- Widgets and Web Parts
- Search
- Governance and Security

### Activity Streams

Activity Streams are a vital part of the social experience in Jive and are core to the architecture of the Pointer for Jive. Pointer incorporates SharePoint document activities as another social stream in order to raise awareness of key enterprise content. This additional activity stream helps increase collaboration on SharePoint content that might have otherwise gone unnoticed. With Pointer for Jive you can seamlessly include SharePoint Activity into your Jive Activity Stream as illustrated in the below screenshot.

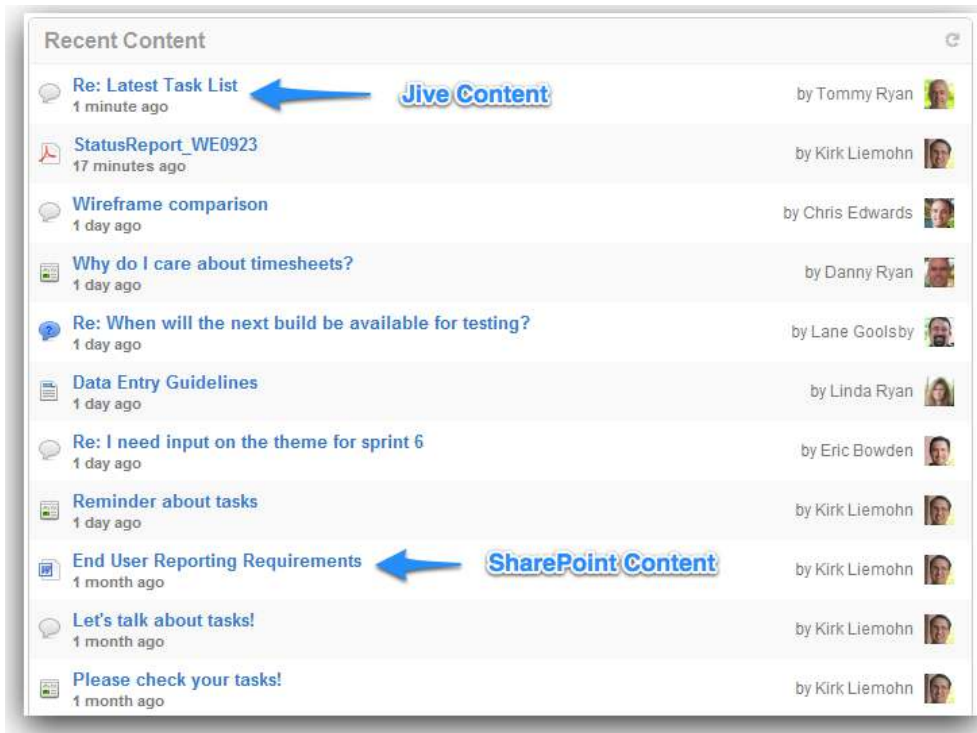


Figure 2 -Recent Content Widget within a Jive Place

When a social connection is made between Jive and SharePoint, it is a SharePoint site (and optionally that site's sub-sites) that is connected to a Jive Place (Space, Group or Project). This channels the activity signals to the appropriate audience in Jive. These document activities will now appear in the targeted Jive Place and the top-level activities that a Jive User sees across all of their Jive Places. This document activity in SharePoint is also security trimmed based on the security model chosen when socializing a SharePoint Site. The screenshot below shows the key elements of configuring the social connections between SharePoint and Jive. As you can see below, you determine a) where in Jive the social signal will appear, b) what in that site (and sub-sites) is socialized, and c) what security model you want to enforce.

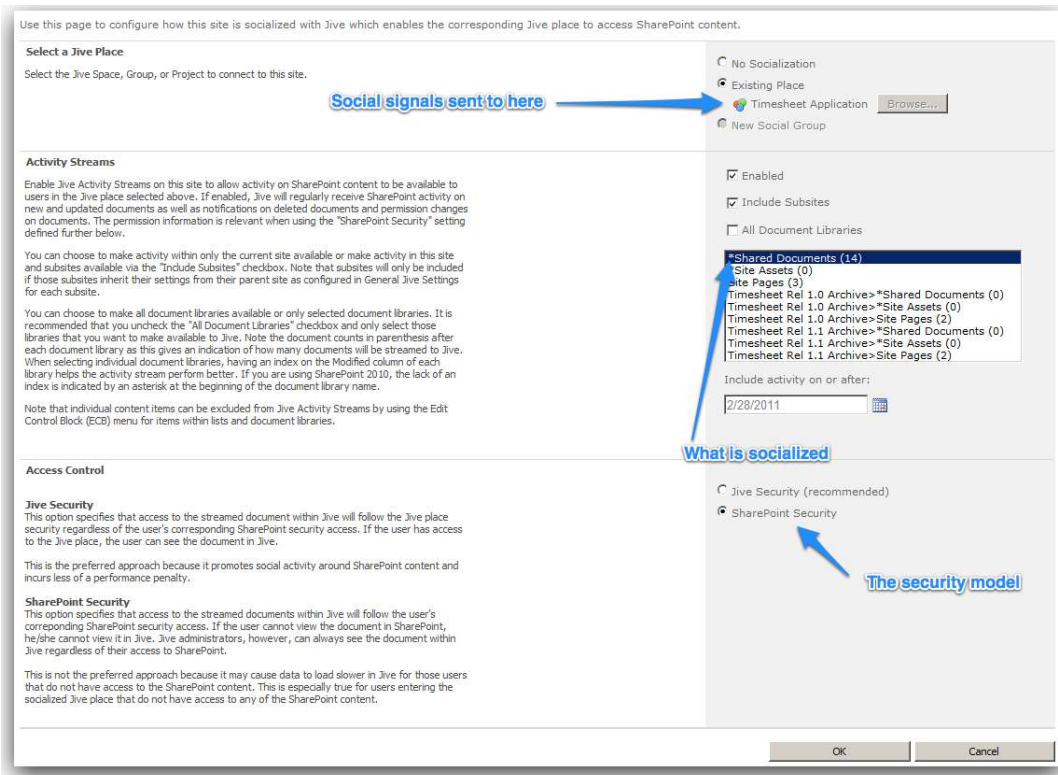


Figure 3 - Jive Socialization Settings for a SharePoint Site

When determining the Access Control, you can choose either SharePoint Security or Jive Security. The SharePoint Security applies the ACLs (Access Control Lists) that exist in SharePoint. The Jive Security will lock down the content based on the membership permissions applied in the Jive Place that is receiving the activity signals. Note that this will allow users in Jive that do not have access the SharePoint site to see SharePoint content with Jive's Preview technology, but will not enable the user to go back into SharePoint to edit the document (since they do not have permissions to the master copy of the document).

## Documents

Key to the Pointer for Jive integration is how documents are handled in Pointer for Jive. Pointer for Jive was architected to allow documents to exist in SharePoint, in Jive or in SharePoint and Jive. Organizations typically will store documents in SharePoint and socialize them to Jive through a Socialization relationship. In the diagram below, you will see that the Engineering SharePoint site and its sub-sites are connected to the Jive Engineering Place. This connection that was illustrated earlier in the Jive Socialization Settings allows document activity to be channeled to the right audiences in Jive.

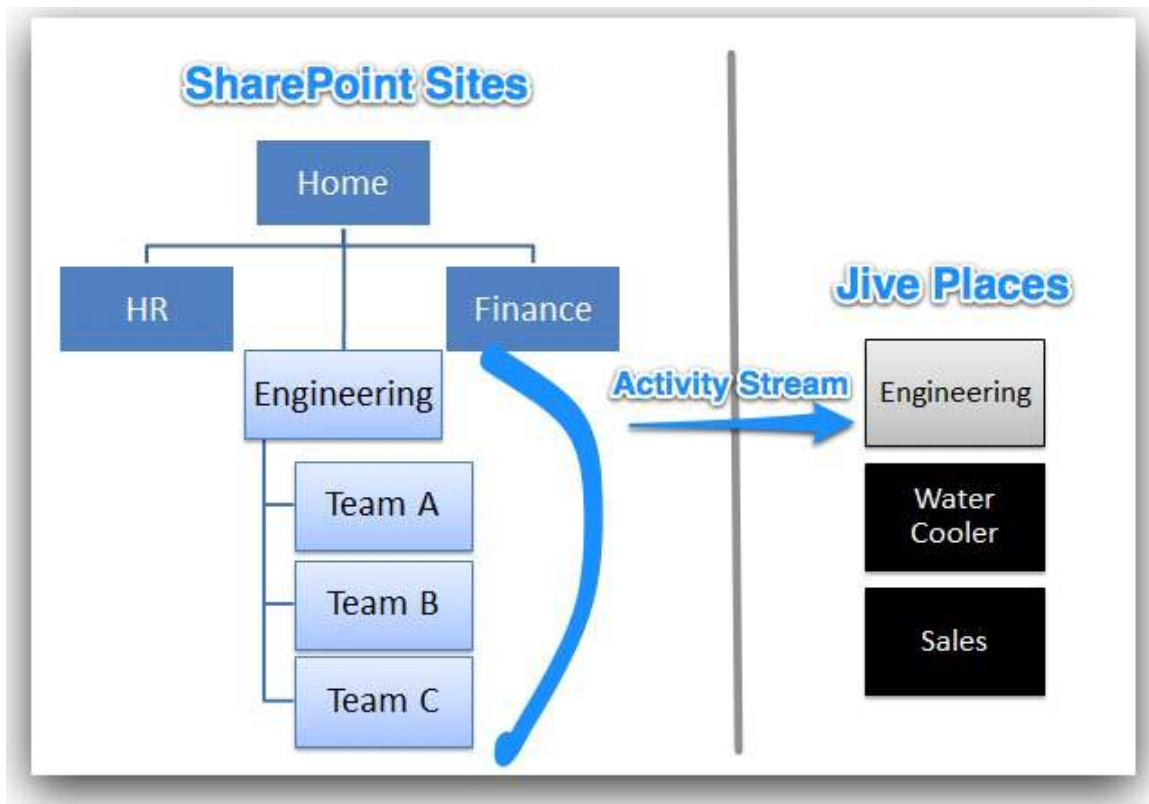


Figure 4 - Socialization Relationship between SharePoint and Jive

After this socialization relation is established, you are now in the position to interact with SharePoint documents within Jive. Now when looking at content within Jive you will have specialized binary document content that is viewable in Jive and controlled by SharePoint. These SharePoint owned documents can be socialized in Jive just like documents that natively exist in Jive. It is only when the user edits the document, that they notice the document is accessible through a direct link to the document in SharePoint (note **Figure 7 – Socialized Document within Jive UI** shows an example of the links provided to get to the document in SharePoint).

Document libraries, that have been configured to be in the Activity Stream, will behave a little differently. The first thing you will notice is that the document library will have Jive Status icons that helps indicate what is and is not being shared with Jive in the Activity Stream. As you can see below, document libraries in SharePoint that have been socialized will yield status. The red and black icon represent it being blocked based on configuration in Corporate Policies (see **Governance and Security** in this section for more detail on Corporate Polices). The greyed out icon indicates someone has manually chosen to disable this document from the activity stream and the green icon indicates this document is actively being streamed to Jive.

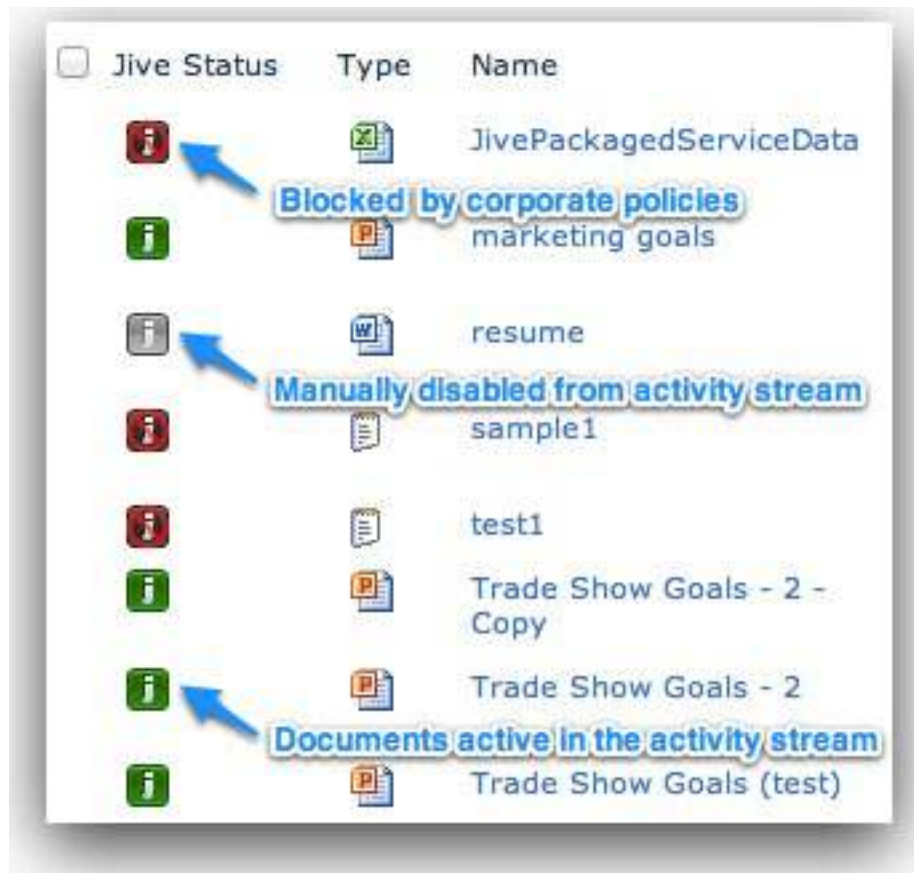


Figure 5 – Jive Status Icons in a Socialized SharePoint Document Library

For the documents that are actively being streamed to Jive, you now have the ability to leverage the social features in Jive to increase the level of collaboration with SharePoint content.

## Social

The main purpose of Pointer for Jive is to provide a social experience for content that might be otherwise hidden in information silos within SharePoint. No matter if you have SharePoint 2007 or SharePoint 2010, you have the ability to comment on documents, rate documents, like documents, tag documents and even include a reference to these documents in your status updates and discussions that you create within Jive.

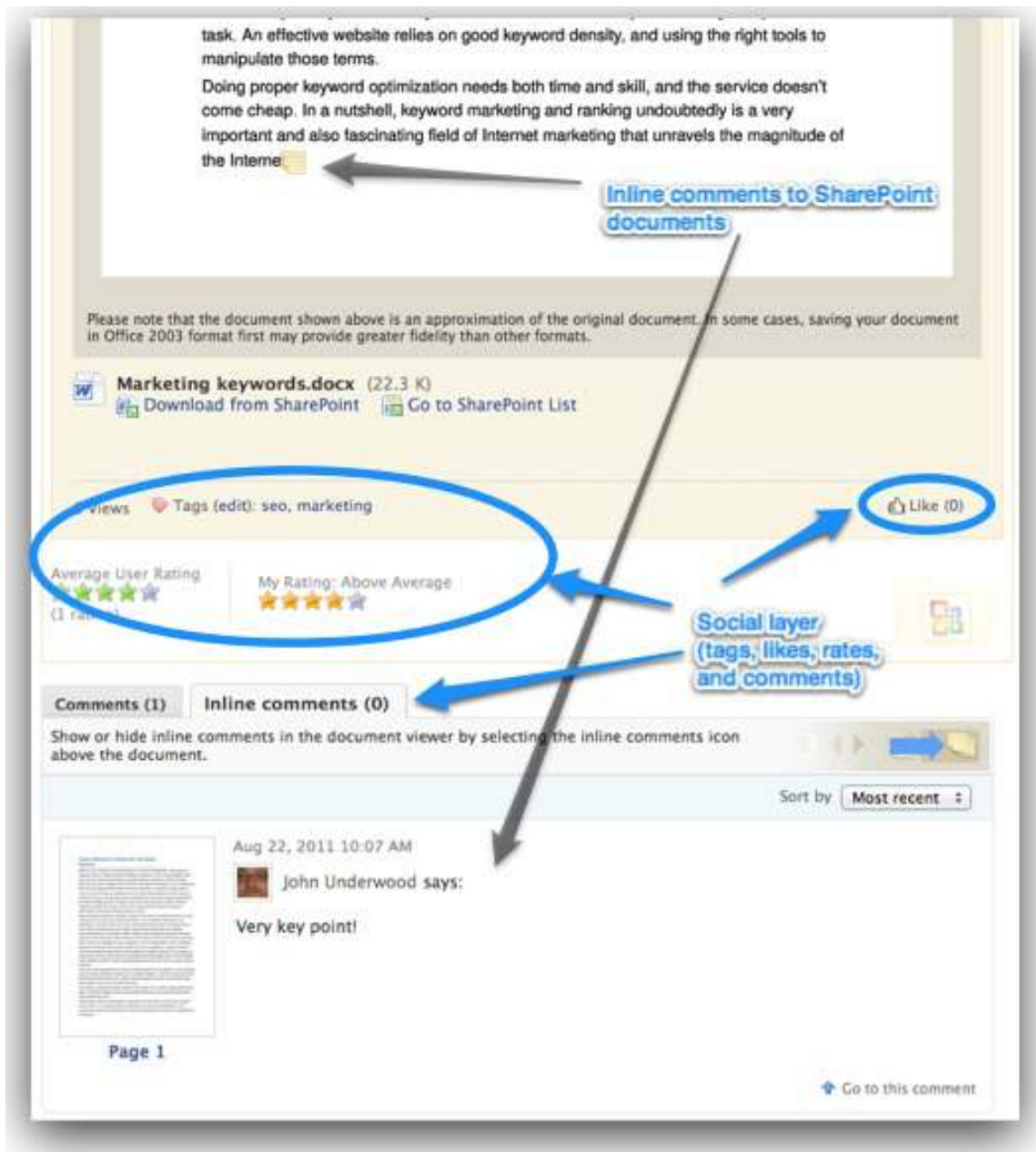


Figure 6 - Socialized Document within Jive UI

Beyond documents, Pointer for Jive allows you to follow people and places in Jive while you are in the SharePoint user interface. You are integrated with the profile of the user in Jive from SharePoint through User Popups for the people picker fields in SharePoint (see **Figure 8 – Jive Profile from User Popup** for an example).

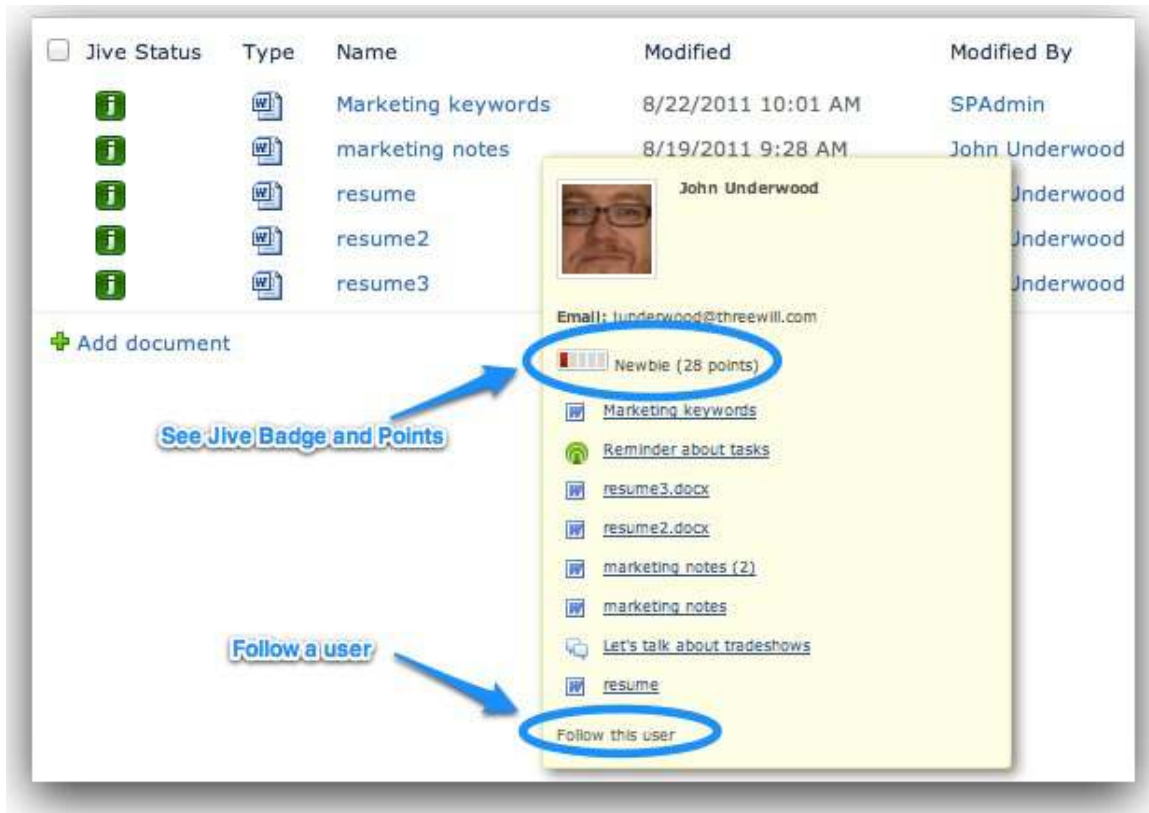


Figure 7 - Jive Profile from User Popup

As illustrated in the above popup, you see information about users like their badge and recent content they have modified along with the ability to follow that user. Along with user popups there are popups that show recent content for Places in Jive along with the ability to follow that Place in Jive.

As you can see with these features, Pointer for Jive is intended to increase collaboration around documents in SharePoint through providing a social layer on top of those documents. This additional social context to documents is intended to bring to the top the key content that matters to you based on activity and your social graph.

## Widgets and Web Parts

There are several widgets and web parts that come with the Pointer for Jive. These User Interface components allow for viewing information from one system in the other system. For example, the **Watch a Tag** web part in SharePoint allows you to monitor tagged content in Jive from a page within SharePoint.



## SharePoint Web Parts

As of version 1.6 of the Pointer for Jive, the following web parts are available:

1. **Federated Search Web Part** - This web part can be used to search Jive content within a SharePoint page. In addition, this federated search web part can be configured on the SharePoint Search Results Web Part Page to display Jive Search Results alongside SharePoint Search Results.
2. **Jive Actions Web Part** - This web part allows initiating the creation of Jive content (Discussions, Documents, Blog Posts and Tasks) from the SharePoint User Interface.
3. **Places Web Part** - This allows a user to browse Jive Places and SharePoint Sites and see a list of "Your Places". Your Places concept is similar to the Places Widget in Jive. It contains a list of all places you follow. In this SharePoint Web Part, it also contains the SharePoint Sites you follow.
4. **Recent Content Web Part** - This web part allows you to select a Jive Place and monitor the content activity in that Place.
5. **Watch a Tag Web Part** - This web part allows you to monitor tags across a specified Jive Instance for a list of predetermined tags for a predetermined list of content types in Jive.

## Jive Widgets

As of version 1.6 of Pointer for Jive, the following Jive widgets are available<sup>20</sup>:

1. **SharePoint Calendar Widget** - This allows visualizing SharePoint Calendars within the Jive User Interface. It also gives contextual links to view the calendar natively in SharePoint and/or edit events directly in SharePoint.
2. **SharePoint List Widget** - This allows visualizing SharePoint Lists within the Jive User Interface. It also gives contextual links to view the list natively in SharePoint and/or edit items directly in SharePoint.
3. **SharePoint Sites Widget** - This widget allows a user to see the site and sub-sites that are socialized to the current Jive Place. This widget also allows the user to link directly over to the site if the user wants to navigate natively inside of the SharePoint Site.

Note that you can learn more about features and configuration of these widgets and web parts in the public documentation for Pointer for Jive (see Pointer for Jive public documentation <sup>21</sup>).

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<sup>20</sup> Note that these widgets only appear when the Jive Place has a SharePoint Site configured to be socialized to the corresponding Jive Place. After this socialization is in place, then the Jive Widgets appear and the scope of the configuration for these widgets is limited to what is included in the socialization relationship.

## Search

One of the key features that most connectors provide is the ability to search across platforms. Both SharePoint and Jive have worked on tweaking the ability to provide relevant results based on query terms. Because Pointer for Jive wants to leverage the indexes built by each respective servers (Jive and SharePoint), the integration is architected with federating the query and letting each system maintain indexes for their own native content. SharePoint owns the index for the SharePoint stored content and Jive for the Jive content. When a search is requested, there is a federated query to find content in the index of the other integrated server (e.g. Jive can federate a search query to SharePoint and SharePoint's query engine will find results in SharePoint that match the query). Note the search results order will depend on the relevancy algorithm of the respective system. As part of Pointer for Jive's architecture, these search results are security trimmed based on the interactive user that has made the request.

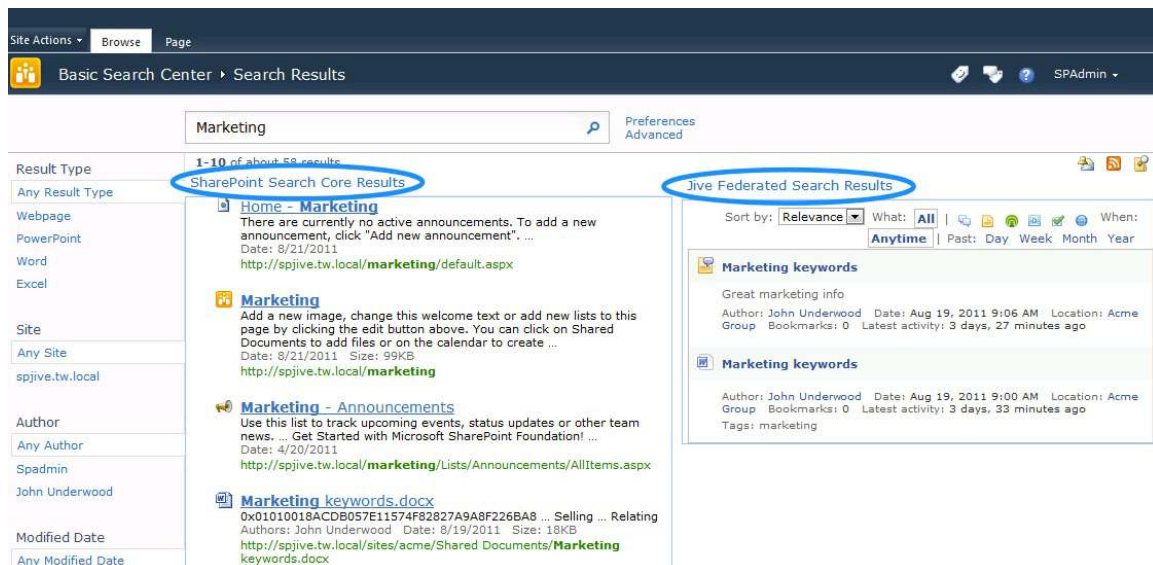


Figure 8 -SharePoint Search Results alongside Jive Federated Search Results

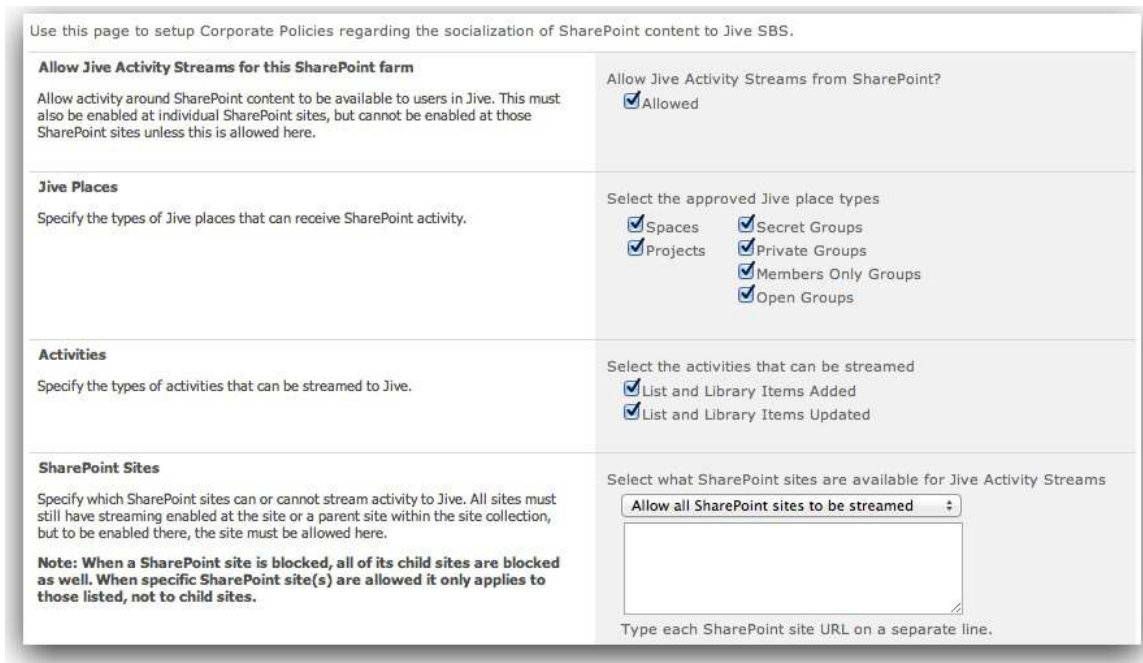
<sup>21</sup> Pointer for Jive public documentation, [http://docs.jivesoftware.com/jive\\_sbs/5.0/index.jsp?topic=/com.jivesoftware.help.online.sharepoint\\_5.0/admin/MakeSharePointJive.html](http://docs.jivesoftware.com/jive_sbs/5.0/index.jsp?topic=/com.jivesoftware.help.online.sharepoint_5.0/admin/MakeSharePointJive.html)

## Governance and Security

For most people, the topic of governance and security can be quite boring and sterile, but they are key to SharePoint Administrators. Pointer for Jive was designed from the beginning to be secure and provide the knobs needed to govern what is socialized from SharePoint. Let's start with the Corporate Policies. Corporate Policies for Jive in SharePoint's Central Administration allows SharePoint Farm Administrators to apply policies to govern what content can be socialized to Jive, and to where in Jive the content can be socialized.

As displayed in the **Figure 9 - Corporate Policies for Jive - Activities, Places and Sites**, you can:

- Globally enable and disable the activity stream.
- Specify the Jive Places that can be setup with SharePoint socialization.
- Determine what activities are monitored (additions, updates)
- Specify the SharePoint Sites that can be socialized.



Use this page to setup Corporate Policies regarding the socialization of SharePoint content to Jive SBS.

<p><b>Allow Jive Activity Streams for this SharePoint farm</b></p> <p>Allow activity around SharePoint content to be available to users in Jive. This must also be enabled at individual SharePoint sites, but cannot be enabled at those SharePoint sites unless this is allowed here.</p>	<p>Allow Jive Activity Streams from SharePoint?</p> <p><input checked="" type="checkbox"/> Allowed</p>
<p><b>Jive Places</b></p> <p>Specify the types of Jive places that can receive SharePoint activity.</p>	<p>Select the approved Jive place types</p> <p><input checked="" type="checkbox"/> Spaces    <input checked="" type="checkbox"/> Secret Groups  <input checked="" type="checkbox"/> Projects    <input checked="" type="checkbox"/> Private Groups  <input checked="" type="checkbox"/> Members Only Groups  <input checked="" type="checkbox"/> Open Groups</p>
<p><b>Activities</b></p> <p>Specify the types of activities that can be streamed to Jive.</p>	<p>Select the activities that can be streamed</p> <p><input checked="" type="checkbox"/> List and Library Items Added  <input checked="" type="checkbox"/> List and Library Items Updated</p>
<p><b>SharePoint Sites</b></p> <p>Specify which SharePoint sites can or cannot stream activity to Jive. All sites must still have streaming enabled at the site or a parent site within the site collection, but to be enabled there, the site must be allowed here.</p> <p><b>Note: When a SharePoint site is blocked, all of its child sites are blocked as well. When specific SharePoint site(s) are allowed it only applies to those listed, not to child sites.</b></p>	<p>Select what SharePoint sites are available for Jive Activity Streams</p> <p>Allow all SharePoint sites to be streamed +</p> <p>Type each SharePoint site URL on a separate line.</p>

Figure 9 -Corporate Policies for Jive - Activities, Places and Sites

Also included in Corporate Policies for Jive is the ability to filter content and users. As you can see below, for File Extensions and Content Types you can allow all, block a predetermined list of extensions/content types or only allow a predetermined list. One last setting available in Corporate Policies for Jive is to block certain user activity from the Activity Stream. This can come in handy if you have a service account that modifies files and you do not want to see those modifications propagate through the Activity Stream.

<p><b>File Extensions</b></p> <p>Specify the file extension streaming rules. This affects whether or not activities on files within SharePoint document libraries are streamed to Jive.</p>	<p>Select what file extensions are available for Jive Activity Streams</p> <p><b>Block the following file extensions</b></p> <p>txt xls xlsx</p> <p>Type each file extension (e.g., xls, doc, docx) on a separate line.</p>
<p><b>Content Types</b></p> <p>Specify the content type streaming rules. This affects whether or not activities on specific content types within SharePoint lists and libraries are streamed to Jive.</p> <p>In SharePoint, the base content type is "Item". All other content types such as "Document" and "Task" inherit from this content type and are derived content types of "Item". For more information see Content Types and Base Content Type Hierarchy.</p> <p><b>Note: When a content type is blocked, it applies to all derived content types as well. When specific content type(s) are allowed it only applies to those listed, not to derived content types.</b></p>	<p>Select what content types are available for Jive Activity Streams</p> <p><b>Allow all content types to be streamed</b></p> <p>Type each content type name (e.g., Picture, Contact) on a separate line.</p>
<p><b>User Settings</b></p> <p>Specify which users, if any, have the streaming of all of their activity to Jive blocked.</p> <p>You can enter user multiple user names by separating them with semicolons.</p>	<p>Specify users whose activity is blocked from Jive Activity Streams</p> <p>TW\coalsont;</p>

Figure 10 -Corporate Policies for Jive - Content and User Filtering

After these Corporate Policies are established, it will be up to Site Administrators to determine if a SharePoint Site is socialized and what content in that site is socialized. Within each SharePoint site that is socialized to Jive, the Site Administrator needs to decide what document libraries are socialized to Jive and what security model needs to be enforced within Jive when determining if a user can see the document content.

As was pointed out in an earlier **Figure 4 - Jive Socialization Settings for a SharePoint Site**, there needs to be a decision on the security model that is applied when a SharePoint Site is socialized. These options are SharePoint Security and Jive Security (the former option secures content to the permissions managed on the individual documents in SharePoint and the later secures the preview of SharePoint documents at the level of the Jive Place). The SharePoint Security model will make sure users in Jive can only see SharePoint documents in the Activity Stream if they have read access to the document in SharePoint. The Jive Security is used to allow previews to documents in SharePoint independent of the user having access to SharePoint. These security options give some flexibility on opening up security where it is appropriate. Note that there is still a level of control on this content based on the type of Jive Place that is receiving the activity signals and the membership of that Jive Place.

The security features of Pointer for Jive are a big part of the architecture of the product. There are many other security features that are engineered into the product to keep the communications secure between the two server platforms (Jive and SharePoint). The

security is engineered to honor the different authentication mechanisms (Basic, SAML, NTLM, Kerberos, etc.) and single sign-on architectures<sup>22</sup>.

Pointer for Jive has been architected to keep content secure and at the same time allow the content to have more social features. Note that throughout the integration SharePoint Permissions and Jive Permissions are enforced (e.g. Search, Activity Streams, Widgets and Web Parts, and Documents), so all the work put into governing content can be leveraged and not compromised.

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<sup>22</sup> For more detail on authentication see the Pointer for Jive: Authentication Scenarios in the Jive public documentation - [http://docs.jivesoftware.com/jive\\_sbs/5.0/topic/com.jivesoftware.help.online.sharepoint\\_5.0/admin/JiveConnectsForSharePointAuthenticationOverview.html](http://docs.jivesoftware.com/jive_sbs/5.0/topic/com.jivesoftware.help.online.sharepoint_5.0/admin/JiveConnectsForSharePointAuthenticationOverview.html)

## Next Steps

Here are some next steps to consider after reading this white paper.

### Read the Future of Enterprise IT White Paper

If you haven't already, read Geoffrey Moore's white paper on systems of record vs. systems of engagement - [Systems of Engagement and the Future of Enterprise IT: A Sea Change in Enterprise IT](#)

### Learn More About Jive

Use the latest version of Jive today - Sign up for the Jive Community – <http://community.jivesoftware.com>

### Join the ThreeWill Open Group on the Jive Community

Find out what's the latest on Pointer, ask questions, and get involved - <https://community.jivesoftware.com/groups/threewill-solutions>

### Join the Conversation

What do you think about Jive vs. SharePoint? Join the conversation - <https://community.jivesoftware.com/message/649540#649540>

### Learn More About ThreeWill's Packaged Services for Jive and SharePoint

<http://www.threewill.com/services/jive-sharepoint/>

### Try Jive Now

<http://www.jivesoftware.com/products/try-jive>

### Try SharePoint Now

<http://technet.microsoft.com/en-us/evalcenter/ee388573.aspx>

## Appendix A – Lessons Learned From Field Deployments

We wanted to share some of the lessons learned so far about deploying Pointer for Jive.

### Get the business involved early and keep them involved.

IT may understand business requirements but will tend to have a more “fuzzy” notion of the goals that drive those requirements. The business can communicate requirements at a very detailed level, and can make sure that they are understood in terms of broader goals and business strategies. Keeping this global context in focus is very important to ensure that the resulting implementation truly enables business goals.

### Adequate planning is essential.

Two or more heterogeneous systems are being connected. Important questions to consider:

- Do the systems have the same user base? (Example: Jive on extranet; SharePoint on intranet).
- Do the systems have the same user store?
- What are the connectivity characteristics of the two systems? (Examples: Jive is hosted but SharePoint is inside the firewall; SharePoint uses an internal certificate authority, while Jive uses an external trusted certificate authority.)
- What does the test environment look like? Testing connected systems can be challenging due to the need to simulate the characteristics of the production system environments. Simply backing up production systems and restoring them into the test environment can be complicated by the need to manually alter system configuration. (Example: URLs must be changed so that the test instances are linked to each other and not still pointing to a production instance.)
- Whose security model controls access to content? (Example: SharePoint security mode or Jive security mode? Best Practice: Don't overuse SharePoint security mode, since there is a significant performance penalty due to the security trimming cost on the Jive side.)

Careful infrastructure architecture planning is required to resolve such issues prior to implementation.

### Leverage the strengths of each connected system.

SharePoint's core strengths are its provisioning engine, the content management capabilities it provides through lists and libraries, and the process management capabilities it provides through workflows. The strengths of social computing products like Jive lie primarily in their ability to facilitate communication related to content and business

processes. Failing to focus on strengths of each system can result in a brittle, anemic solution that fails to facilitate true collaboration across the enterprise.

## Appendix B – 10 Key Resources

The purpose of this section is to provide a convenient listing of 10 key resources for readers of the white paper.

1. AIIM White Paper from Geoffery Moore (author of Crossing the Chasm) on systems of engagement v. systems of record - <http://www.aiim.org/futurehistory>
2. Moving Beyond Systems of Record to Systems of Engagement from Dachis Group: Moving Beyond Systems of Record to Systems of Engagement « Dachis Group Collaboratory, <http://www.dachisgroup.com/2011/06/moving-beyond-systems-of-record-to-systems-of-engagement/>
3. Enterprise 2.0 and SharePoint 2010, Doculabs, January 2011, <http://www.doculabs.com/wp-content/plugins/download-monitor/download.php?id=19>
4. Three Part Series on the Pointer for Jive (formerly Jive Connects for SharePoint) by Jennifer Bouani of Manheim
  - a. <https://community.jivesoftware.com/community/business-conversations/blog/2010/07/29/jivin-with-sharepoint-connector>
  - b. <https://community.jivesoftware.com/community/business-conversations/blog/2010/08/10/jivin-with-sharepoint-connector-part-2-of-3>
  - c. <https://community.jivesoftware.com/community/business-conversations/blog/2010/08/24/jivin-with-sharepoint-connector-part-3-of-3>
5. Take your SharePoint implementation to the next level blog post from the Dachis Group - <http://www.dachisgroup.com/2011/06/take-your-sharepoint-implementation-to-the-next-level/>
6. Why SharePoint 2010 Social Features Suck - <http://blog.furuknap.net/why-sharepoint-2010-social-features-suck>
7. How to Make SharePoint More Social without Creating a New Silo - <http://www.cmswire.com/cms/enterprise-20/how-to-make-sharepoint-more-social-without-creating-a-new-silo-012381.php>
8. Four SharePoint Misconceptions - <http://www.threewill.com/2010/09/four-sharepoint-misconceptions/>
9. Benefits of SharePoint 2010 as a Product Platform White Paper, ThreeWill and SharePoint Directions, <http://www.slideshare.net/threewill/benefits-of-sharepoint-2010-as-a-product-platform>



10. 8 More Things You Need to Know About SharePoint -

<http://www.aiim.org/Resources/eBooks/SharePoint/8-More-Things-You-Need-to-Know-About-SharePoint>. Gems include:

- Point #2: SharePoint Can Do Everything - Given Enough Time and Resources.
- Point #7: Understand That SharePoint has the Potential to be One of the Biggest and Most Difficult Challenges in the History of IT.