Clearvale It Guide

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1 Installing Clearvale It

Clearvale It is an add-in product for Microsoft Outlook that lets you share email messages from Outlook with your Clearvale® network. You control where the message appears (for example, on the Network page or within a community), and what type of content is posted.

Clearvale It is developed by BroadVision for use with Clearvale Enterprise networks.

Prerequisites

Outlook prerequisites

- You must have Microsoft Outlook 2003, 2007, or 2010 installed on your computer.
- If you are using Outlook 2007 or 2010, the Clearvale It installer requires that you also have:
  - .NET Framework 3.5.

    To check if you have .NET 3.5, run **Control Panel>Add or Remove Programs** and look for **Microsoft .NET Framework 3.5**. If you do not see this, download the framework from http://www.microsoft.com/download/en/details.aspx?id=21.
  - Microsoft VSTO 3.0 runtime.

    To check if you have VSTO, run **Control Panel>Add or Remove Programs** and look for **Visual Studio Tools for the Office system 3.0 Runtime**. If you do not see this, download the Microsoft VSTO 3.0 runtime from http://www.microsoft.com/download/en/details.aspx?id=23656.
- You cannot use the Clearvale It add-in if you access Outlook on a browser.

Clearvale prerequisites

- You must have at least the Writer role on the Clearvale network where you want to share Outlook mail messages.
- If your network uses OpenID for authentication, you cannot share Outlook messages to your network.
- Your network must have the Clearvale API enabled. Contact BroadVision if you need this configured for your network.

Installing Clearvale It on Outlook 2003

Install Clearvale It on your PC where you are running Outlook.

To install Clearvale It on Windows 2003

1. Download the Clearvale It executable file from BroadVision.

   The executable file is located here:
   https://apps.clearvale.com/outlook/addin/2003/ol2003cvi.exe

2. Run the Clearvale It .exe file on the machine where you are running Outlook.

3. Follow the prompts to install Clearvale It.

   The default installation location depends on the version of Windows that you are running:

   - For XP, the path is something like `C:\Documents and Settings\`*`user-name`*`\Application Data\BroadVision\BroadVision Clearvale It Add-in`.
   - For Vista or Windows 7, the path is something like `C:\Users\`*`user-name`*`\AppData\Roaming\BroadVision\BroadVision Clearvale It Add-in`.

4. Restart Outlook.

   You should see the Clearvale It button on the BroadVision toolbar added to your Outlook window.

   TIP: If you do not see the Clearvale It button in Outlook, make sure that you fully stop Outlook by selecting **File>Exit**. Then, check the Task Manager and make sure there are no Outlook processes running before restarting Outlook again. Or, you can restart your computer.

Installing Clearvale It on Outlook 2007 or 2010

The Clearvale It Installer for Outlook 2007 and 2010 uses the Microsoft ClickOnce technology and allows you to download the software from a web page. Additionally, updates to Clearvale It are handled automatically.

IMPORTANT: ClickOnce requires the Internet Explorer browser. Other browsers such as Chrome or Firefox, are not supported by ClickOnce.

To install Clearvale It on Outlook 2007 or 2010

1. Start the Internet Explorer browser.
2. Copy and paste the following URL in the Internet Explorer address bar:

```
https://apps.clearvale.com/outlook/addin/2007+/BroadVision%20Clearvale%20It%20Add-in.vsto
```

   If you see a message about the file type not being recognized, check the prerequisites on page 5.
3. If you see a prompt about allowing the `VSTOInstaller.exe` to run, click **Allow**.
4. In the Microsoft Office Customization Installer window, click **Install**.
5. Click **Close** to confirm the installation.
6. Restart Outlook.

   You should see the Clearvale It button on the BroadVision toolbar added to your Outlook window.

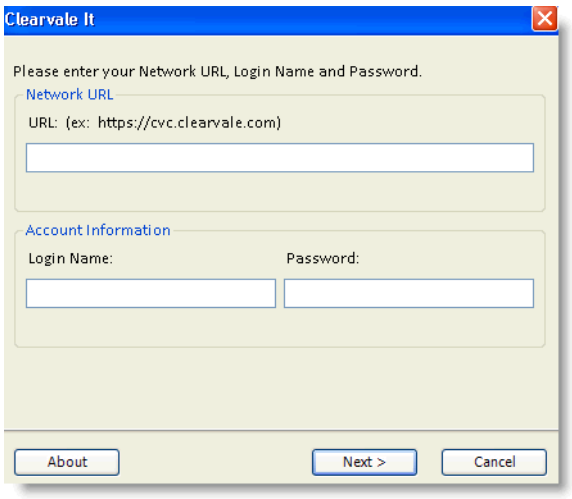
Configuring Clearvale It

After you install Clearvale It, you need to configure it so that it knows the network or networks on which you want to post email content.

To configure Clearvale It to access your Clearvale network

1. In Outlook, click the **Clearvale It** button.

   A dialog box appears where you define the values for your network.



2. Enter the URL for your network.
3. Enter your Clearvale login name.

   This is usually your email address.
4. Enter your Clearvale password.
5. Click **Next**.

To configure another network

1. If you have already configured a network, click the **Clearvale It** button.
2. Select **Add Network...** from the **Network** drop-down menu.
3. Define the new network to use.

   The latest network defined is used as the default network.

2 Sharing Outlook Messages with Clearvale

Sharing Outlook email messages with your Clearvale network is easy. This chapter explains how to share email messages and then make sure they look as expected in Clearvale.

Sharing Email Messages

You can share any Outlook email message with your Clearvale network. When sharing a message, you need to tell Clearvale where to put the message and how to handle any attachments.

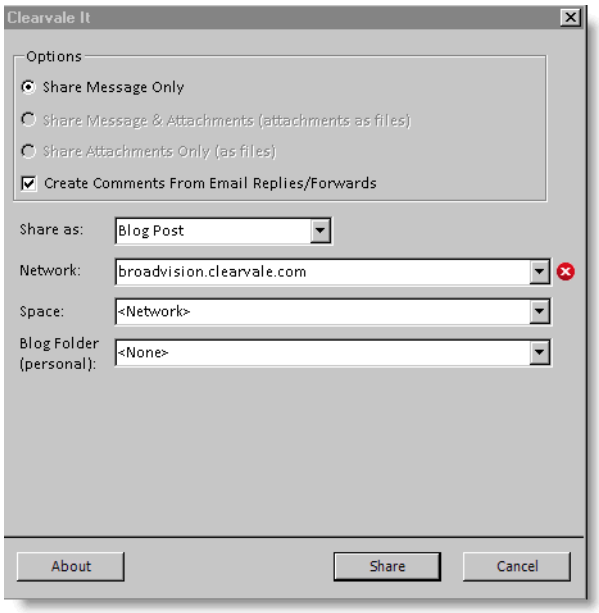
To share an Outlook email message with your Clearvale network

1. In Outlook, select the email message to share with Clearvale.

   Note also that you can select multiple messages by using CTRL-click. If you select multiple messages, they are each posted to Clearvale as separate content items.

2. Click the **Clearvale It** button.

   The Clearvale It popup window appears.



3. In the Options area, specify how to share the message with your network:

Option	Description
Share Message Only	Share the message, but not any attached files. Note the following about sharing messages: • If the email is a thread of messages, all replies to the original message are included in the body of the content item. • Check the **Create Comments from email Replies/Forwards** option to instead include all replies to the original email as comments on the content item. • If the message contains images or objects embedded within the email message, as opposed to being an attachment, those images or objects are not shared with the network.
Share Message & Attachments	Share the message (as described above) and upload all attachments in the email thread. The attachments are uploaded as files on the network.
Share Attachments Only	Upload just the attachments in the email thread. The attachments are uploaded as files on the network. The email message and any replies are not shared with the network.

4. In the **Share as** field, specify the Clearvale content type to use for sharing the email message:
   - **Forum topic.** The message becomes a forum topic in the space and forum that you select.
   - **Blog post.** The message becomes a blog post in the space you select.
   - **Wiki.** The message becomes a wiki page in the space and beneath the wiki that you select.
   - **Microblog.** The message becomes a microblog (status update) in the space you select.
   - **Task.** The message becomes a task created by you. The task is assigned to the email recipients. If a recipient is not a member or guest of the network, they are not assigned the task.

5. In the **Network** field, select the network on which to share the email message.

   If you have defined multiple networks, the most recently used network is assumed. If you do not see the network that you want to use, click **Add Network...** to add a new network.

6. In the **Space** field, select the space with which to share the content.

   Options vary based on the type of Clearvale content that you are creating. Possible values are:
   - Network space (not available for tasks)
   - Personal space (not available for forum topics)
   - A community to which you have access (not available for tasks)

7. Finish specifying where the content should appear in Clearvale.

Forum topic	In the **Forum** field, select the forum in which to post the new forum topic.
Blog post	In the **Blog Folder** field, optionally select a personal blog folder in which to post the new blog post.
Wiki	In the **Parent Wiki** field, select the parent wiki to use. Possible parents are based on the space selected.
Task	In the **Due Date** field, select the due date for the task. The current date is used by default. To change the due date, click the drop-down arrow to display a calendar where you can select a different due date.

8. If you are uploading a file, in the **Document Folder** field, select a folder for the file.

   The default value is **<None>**, which means that no folder is selected.

   If you want to create a new folder in the selected space, select **<Automatically Generated>** from the **Document Folder** list. This creates a folder with the email subject as its name, under the **Clearvale It Attachments** folder.

   If there are multiple files attached to the email, they are all uploaded to the same location.

9. Click **Share**.

10. Click **OK** in the popup that appears to see the page in the Clearvale network where the blog post or forum topic were added.

    If you are not currently logged into your network, you must do so to see the new content in the network.

Verifying That the New Content Looks Correct in Clearvale

After you share an email message, you should check the network and make sure your new content looks correct. Check the following:

- Does the content appear where you expected in the network?
- Does it include a link to the right files?
- Does the email subject line make sense as the content title? If not, edit the item and adjust the title as needed.
- Did any extra files get uploaded that you don't want on the network? For example, if the email message included an image in the signature, it may also appear on the network. You may want to delete that file and any references to it in the content.
- Do you want to remove some of the comments that were added to the content? When you share an email thread, the entire thread of replies is posted. Delete any unneeded replies.
- Are the share settings correct? If you want to share the content with others in the network, you can make those changes directly in Clearvale.
- For tasks, are the right people assigned to the task? You can add or remove task assignees in Clearvale. Clearvale It ignores email aliases, so if the email was sent to an email alias, the people in that alias are not assigned the task.
- Are any embedded images or objects from the original email needed on Clearvale? Clearvale It does not include images or objects that are embedded within the original email. You may need to manually add those images to the content on Clearvale.

If you edit the content in Clearvale, those changes are not reflected back in the original message in Outlook.

Clearvale author

Regardless of who wrote the original email message and who replied, the person who shared the content with the Clearvale network is indicated as the author of the content on Clearvale.

Clearvale activity points

You do not earn any activity points when you share Outlook content with a Clearvale network. If you later edit the content, you can earn activity points.