



*SharePoint
Integration
Guide*

SharePoint Integration Guide

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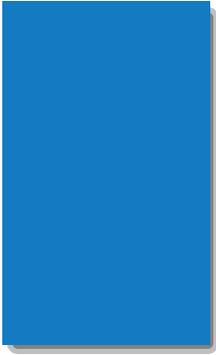
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1

SharePoint Integration

SharePoint Integration is a solution for Microsoft® SharePoint® customers who want to integrate their SharePoint documents with a Clearvale® network.

SharePoint Integration is developed by BroadVision for use with Clearvale Enterprise networks.

Prerequisites

SharePoint prerequisites

- You must be using SharePoint 2010.
- You must open the ports in the firewall so that Clearvale can access the SharePoint server.

Clearvale prerequisites

- Your network must have both the SharePoint Integration and Clearvale API services enabled. Contact BroadVision if you need these configured for your network.
- You must have at least the Writer role on the Clearvale network where you want to share SharePoint content.
- If your network uses OpenID for authentication, you cannot share SharePoint documents with your network.

Configuring Clearvale to Access SharePoint

As a Clearvale network administrator, you need to configure each network that you want to access SharePoint.

To configure a Clearvale network to access SharePoint

1. As a network administrator on Clearvale, select **Admin>Network Administration**.
2. Scroll down to External Content Integration.
3. Set the following values.

Field	Description
Name	Enter the label by which you want to refer to this SharePoint integration. The name will appear in the External System drop-down list on the pages where you add SharePoint content.
URL	Enter the SharePoint URL.

4. Click **Add** to create your external content connection.
5. Click **Save**.

Configuring SharePoint to Access Clearvale

As a SharePoint administrator, run the script provided by BroadVision to enable integration between SharePoint and Clearvale.

To install the Clearvale solution on SharePoint

1. Download the SharePoint integration software from Clearvale Connect (<http://cvc.clearvale.com>).
Go to the SharePoint Integration community on Clearvale Connect and download the `BroadVision.SharePoint.ClearvaleIntegration.zip` file.
2. Expand the `BroadVision.SharePoint.ClearvaleIntegration.zip` file using something like Winzip.
It contains the following files:
 - `BroadVision.SharePoint.ClearvaleIntegration.wsp`, the SharePoint solution file.
 - `addSPSolution.bat`, the deployment script.
3. Start the SharePoint 2010 Management Shell by selecting **Start>Microsoft SharePoint 2010 Products**.
If you are not logged in as an administrator you will need to use “Run as administrator.”
4. Run the following command:

```
addSPSolution.bat BroadVision.SharePoint.ClearvaleIntegration.wsp  
"BroadVision.SharePoint.ClearvaleIntegration.ExternalLink"  
SharePoint_server_url
```

where `SharePoint_server_url` is the URL for your SharePoint server.

For example, you might enter something like this:

```
addSPSolution.bat BroadVision.SharePoint.ClearvaleIntegration.wsp  
"BroadVision.SharePoint.ClearvaleIntegration.ExternalLink"  
https://sharepoint.broadvision.com
```

5. Make sure that your Clearvale network is defined in SharePoint:
 - a. Log into SharePoint as a user with Full Control permission to the site.
 - b. Select **Site Actions>Site Settings**.
 - c. Under the Clearvale section, click **Clearvale Networks**.
 - d. Make sure that your network is listed. If it is not listed, add it by entering the network name in the **Title** field and the network address in the **URL** field. Save your changes.If you are using multiple Clearvale networks with SharePoint, they all need to be listed here.

Adding SharePoint Documents to Your Network

You can include SharePoint documents in your network in one of two ways:

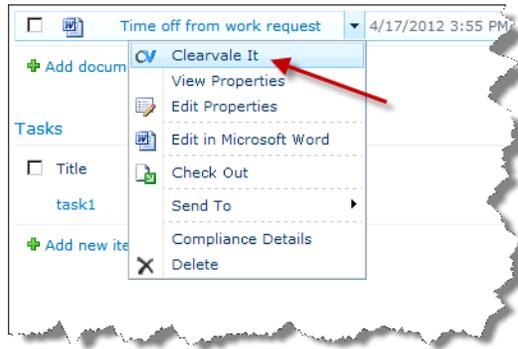
- From within SharePoint, use the **Clearvale It** command to share the document with a Clearvale network.
- From within a Clearvale network, click **Add File** and then navigate to the SharePoint document to include in your network.

The SharePoint documents typically reside in the SharePoint system, and you see a link to the document in your network. However, when you add a document from within SharePoint, you have the option of including a link to the document in SharePoint or actually copying the SharePoint document into your network. If you copy the document into your network, the document is no longer associated with SharePoint and is treated as any other document in Clearvale.

To add a document from within SharePoint

1. Log into SharePoint.
2. Hover the mouse over the document to share.

3. Click the drop-down arrow that appears next to the document to display the context menu and select **Clearvale It**.



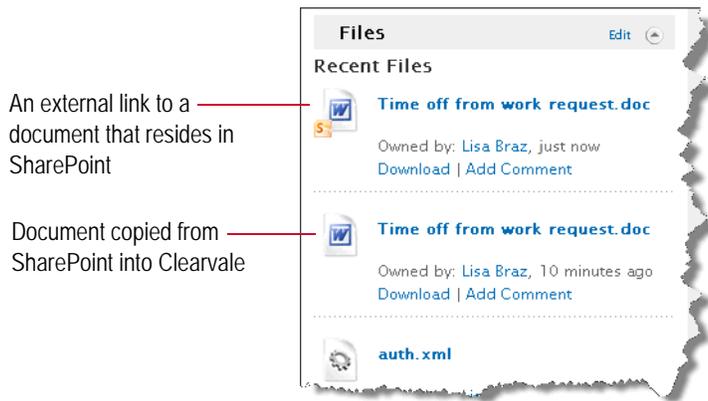
The Clearvale It window appears.

A screenshot of the "Clearvale It" dialog box. It has a title bar with "Clearvale It" and a close button. The dialog is divided into two main sections: "Document Title" and "Destination".
- "Document Title": "Enter the title" with a text input field containing "auth.xml".
- "Destination": "Select the Clearvale space and folder where the document should be shared." with several dropdown menus:
 - "Network": "Please select a network:"
 - "Space":
 - "Folder":
 - "Format": "External Link"
At the bottom are "Submit" and "Cancel" buttons.

4. In the **Network** field, select the name of the network with which to share the document.
You may be prompted for your Clearvale email and password for the network.
5. Specify where you want the document to appear in the Clearvale network:
 - The **Space** drop-down indicates in which space the document should appear. Choices are: **Network** or **Personal**. If your network has additional spaces that you have joined, such as communities, they will appear as options as well.
 - If folders have been created for the content space, the Folders drop-down lets you choose a folder for the document. **None** is the default.

6. Specify whether you want to create a link to the SharePoint document from within Clearvale or if you want to place an actual copy of the document in Clearvale in the **Format** drop-down list.
 - Select **External Link** to provide a link to the SharePoint document within Clearvale.
 - Select **File** to place a copy of the document in Clearvale. Any changes made to the original document in SharePoint are not reflected in the copied version of the document in Clearvale and vice versa. If you check the **View Only** check box, the document is view only in Clearvale, and people cannot download the file.
7. Click **Submit**.

If you created an external link to the SharePoint document, the document appears in your network with a SharePoint icon over the document icon as follows:



If you copied the SharePoint document into Clearvale, the document appears in your network and looks like any other file that you upload to the network.

Tips

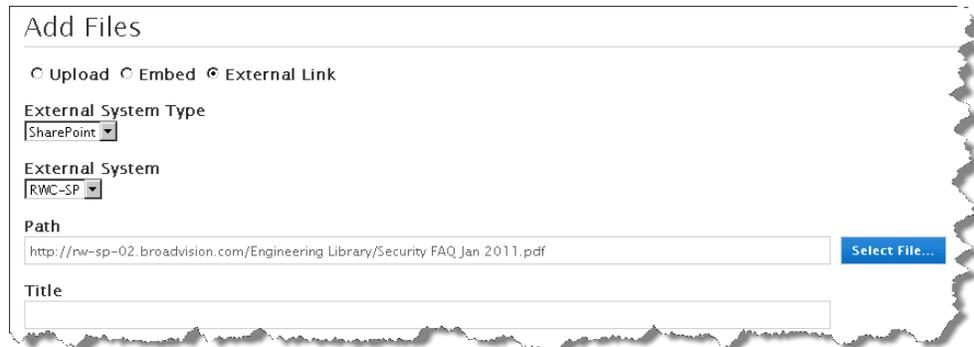
- If you do not see the document in your network, double-check that you are looking in the right space. For example, the document might have been shared to a specific folder or to a specific space, such as a community.
- You earn activity points when working with SharePoint documents just like any other documents in Clearvale. For example, you earn 3 activity points when you share a SharePoint document with your network and 1 point when you update the document.
- If document preview is enabled for your network, you cannot preview SharePoint documents that are external links. However, if you have copied the SharePoint document into Clearvale, you can preview that document like any other Clearvale file.

To add a document from within Clearvale

1. Log into Clearvale.
2. Navigate to the content space where you want to add the SharePoint document.
For example, if you want to share with a community, go to the community and click **Files** in the Community Directory.

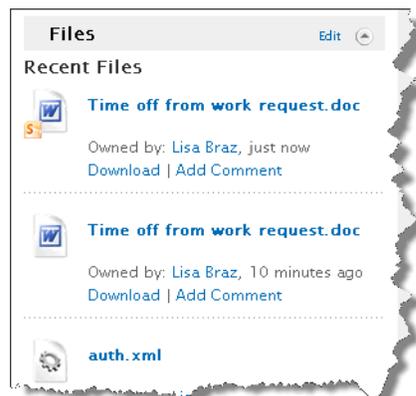
3. Click **Add File**.

The Add Files page appears.



4. Click **External Link**.
5. Select **SharePoint** for **External System Type**.
6. Select your SharePoint system to use from **External System**.
This is the name your network administrator specified for the particular SharePoint system with which your network is integrated.
7. In the **Path** field, click **Select File** to navigate to the document to share.
The Select File popup appears. If needed, click **Browse...** to display another popup file picker where you can navigate to the SharePoint document to share. Select the SharePoint document to use and click **OK**.
8. Specify a title for the document and then finish defining the file for Clearvale and then click **Save**.

The document is uploaded the Clearvale as an external file. It looks as follows in Clearvale:



Handling Document Changes

When you add external links to SharePoint documents in your Clearvale system, the documents are still associated with your SharePoint system. You can make changes to the SharePoint document when you download it from Clearvale. However, for those changes to be applied to the SharePoint system, you need to update the file. At that point, the changes you made are reflected both in Clearvale and SharePoint.

If anyone changes the document on the SharePoint system, you are not notified of these changes in Clearvale. That is, notifications are not generated and nothing appears in the activity stream. But if you download the file from within Clearvale, you will have the revised document.

To upload a revised document to SharePoint

1. Navigate to the SharePoint document within Clearvale.
2. Click **Update** on the file detail page.
3. Click **Browse** (or **Choose File**, depending on your browser) to navigate to the document to upload into SharePoint.
4. Optionally, add a note describing the change you made to the document.
5. Click **Save**.

The new document is uploaded into your SharePoint system. This version of the document replaces the old document on SharePoint and the old document within Clearvale.