



*SharePoint  
Integration  
Guide*

## SharePoint Integration Guide

Document Publication Date: October 16, 2014

Copyright © 2009-2014 BroadVision, Inc., 1700 Seaport Boulevard, Suite 210, Redwood City, California 94063, U.S.A. All rights reserved.

The software and accompanying written materials are protected by U.S. and International copyright law. Unauthorized copying of the software, including software that has been modified, merged, or included with other software, or other written material is expressly forbidden. This software is provided under the terms of a license between BroadVision and the recipient, and its use is subject to the terms of that license. Recipient may be held legally responsible for any copyright infringement that is caused or incurred by recipient's failure to abide by the terms of the license agreement.

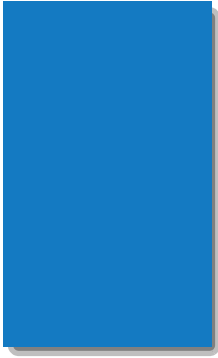
RESTRICTED RIGHTS LEGEND: Terms and Conditions Applicable to Federal Governmental End Users. BroadVision licenses products for ultimate end use by federal government agencies and other federal government customers ("federal government customers") only under the following conditions. Software and technical data rights in these products include only those rights customarily provided to end use customers of Software as defined in the BroadVision Master Software License and Services Agreement and any exhibit thereto. This customary commercial license in technical data and software is provided in accordance with FAR 12.211 (Technical Data) and 12.212 (Computer Software) and, for Department of Defense purchases, DFAR 252.227-7015 (Technical Data - Commercial Items) and DFAR 227.7202-3 (Rights in Commercial Computer Software or Computer Software Documentation). If a federal government or other public sector customer has a need for rights not conveyed under these terms, it must negotiate with BroadVision to determine if there are acceptable terms for transferring such rights, and a mutually acceptable written agreement specifically conveying such rights must be executed by both parties.

The product described in this manual may be protected by one or more U.S. and International patents. Certain applications of BroadVision One-To-One® software are covered by U.S. patent 5,710,887.

DISCLAIMER: BroadVision, Inc., makes no representations or warranties with respect to the contents or use of this publication. Further, BroadVision, Inc., reserves the right to revise this publication and to make changes in its contents at any time, without obligation to notify any person or entity of such revisions or changes.

TRADEMARKS: BroadVision, Clearvale, and the Clearvale logo are trademarks or registered trademarks of BroadVision, Inc., in the United States and other countries.

*All other trademarks, service marks, and trade names belong to their respective owners. BroadVision, Inc., disclaims any proprietary interest in the marks and names of others.*



# Contents

- 1 SharePoint Integration 5**
  - Prerequisites ..... 5
  - Configuring Clearvale to Access SharePoint ..... 6
  - Configuring SharePoint to Access Clearvale ..... 7
  - Adding SharePoint Documents to Your Network ..... 8
  - Handling Document Changes ..... 12



# 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 <b>External System</b> 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.

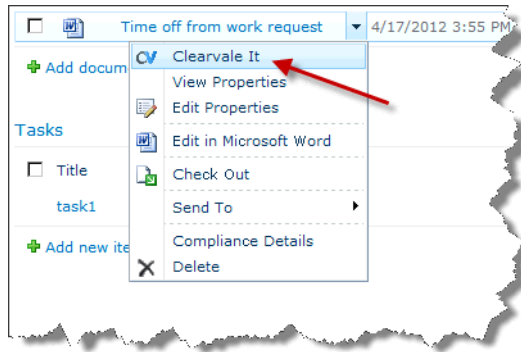
The SharePoint documents typically reside in the SharePoint system, and you see a link to the document in your network. However, when you add a document from within SharePoint, you have the option of including a link to the document in SharePoint or actually copying the SharePoint document into your 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**.



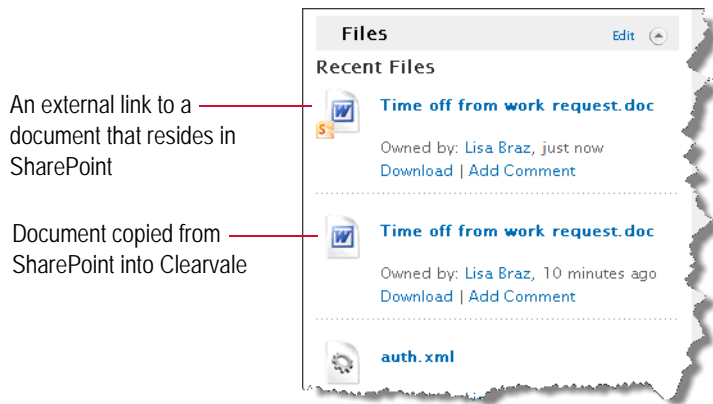
The Clearvale It window appears.

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

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.

- 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.
- 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.

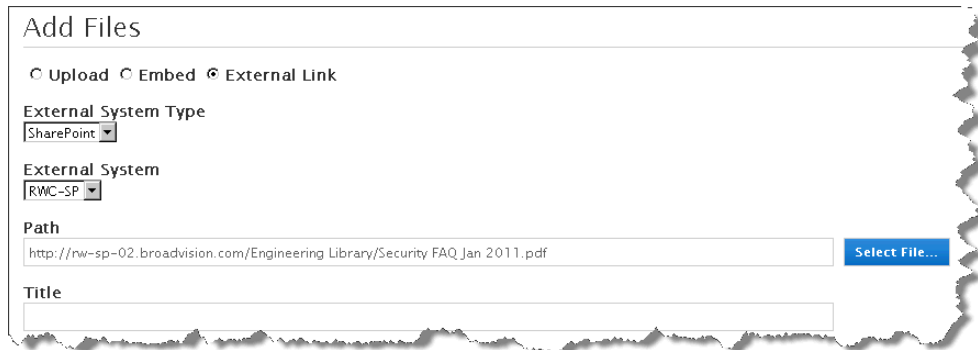
### Tips

- 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

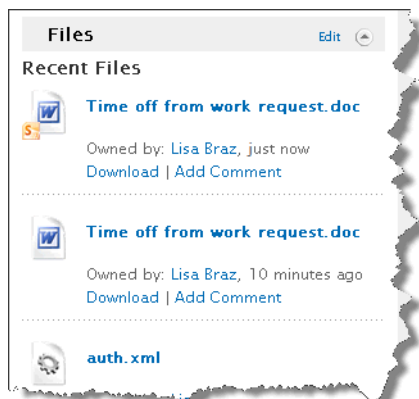
1. Log into Clearvale.
2. Navigate to the content space where you want to add the SharePoint document.  
For example, if you want to share with a community, go to the community and click **Files** in the Community Directory.

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.