

SALESFORCE CHATTER

SharePoint 2010 Chatter Connector

Deployment and Setup Guide

4/30/2012

The Document is a guide for SharePoint Administrators for deployment and setup of the SharePoint Chatter Connector on SharePoint 2010.

Contents

1	Introduction.....	5
1.1	Purpose.....	5
1.2	Setup Overview.....	5
1.3	Pre-Requisites	5
2	SharePoint Chatter Connector Installation.....	6
2.1	Package Verification	6
2.2	Solution Installation	6
2.3	Verify Solution Installation	8
3	SharePoint Chatter Connector Deployment and Configuration	10
3.1	Deploy ChatterMiddleTier.wsp Solution.....	10
3.2	Deploy SFChatterWebParts.wsp Solution.....	12
3.3	Deploy Application Content.....	15
3.4	Chatter Connector Settings.....	16
3.5	Maximum File uploads setting for Web Part	19
4	Using SharePoint Chatter Connector.....	24
4.1	Enabling Features for the Site Collection and Site.....	24
4.2	Verify List Creation for the Site.....	24
4.3	Add Team Site Web part to SharePoint Site	25
4.4	Configure Team Site Web part.....	27
4.5	How to Work with Team Chatter Web part.....	28
4.6	Add My Site Web part to SharePoint Site.....	28
4.7	Configure My Site Web part	30
4.8	How to Work with MySite Chatter Web part	31
5	Other.....	32
5.1	Remove Web Part from Page	32
5.2	Delete SharePoint Lists	33
5.3	Deactivate Features	36

Table of Figures

Figure 1 : Edit Install.bat.....	7
Figure 2: Install.bat before modification	7
Figure 3: Install.bat post modification.....	7
Figure 4: Install.bat run as administrator.	8
Figure 5: SharePoint 2010 Central Administration Home Page.....	8
Figure 6: SharePoint System Settings Page	9
Figure 7: SharePoint Solution Management Page.....	9
Figure 8: SharePoint 2010 Central Administration Home Page.....	10
Figure 9: SharePoint System Settings Page	10
Figure 10: SharePoint Solution Management Page.....	11
Figure 11: SharePoint Solution Properties Page	11
Figure 12: SharePoint Deploy Solution Page	12
Figure 13: SharePoint 2010 Central Administration Home Page.....	12
Figure 14: SharePoint System Settings Page	13
Figure 15: SharePoint Solution Management Page.....	13
Figure 16: SharePoint Solution Properties Page	14
Figure 17: SharePoint Deploy Solution Page	14
Figure 18: SharePoint 2010 Management Shell	15
Figure 19: SharePoint 2010 Central Administration Home Page.....	16
Figure 20: SharePoint Application Management Page.....	16
Figure 21: Chatter Connector Settings Page.....	17
Figure 22: Chatter Connector Settings Page – Web Application	17
Figure 23: Chatter Connector Settings Page – Chatter Remote Access Details	18
Figure 24: Chatter Connector Settings Page – Chatter Environment Settings.....	18
Figure 25: Chatter Connector Settings Page – Chatter SharePoint Connector Settings.....	19
Figure 26: SharePoint 2010 Central Administration Home Page.....	20
Figure 27: SharePoint Application Management Page.....	20
Figure 28: Manage Web Applications Page.....	21
Figure 29: Web Application General Settings Menu.....	21
Figure 30: Web Application General Settings Page	22
Figure 31: Web Application General Settings Page – Maximum Upload Size	23
Figure 32: Salesforce Chatter Team Site Web Part Feature	24
Figure 33: Salesforce Chatter My Site Web Part Feature.....	24
Figure 34: Salesforce Chatter List Creation	24
Figure 35: Edit Page Action.....	25
Figure 36: Insert web part section	26
Figure 37: Salesforce Chatter WebParts – Team Site.....	26
Figure 38: Page with Team Site Web Part	27
Figure 39: Team Site web part edit pane.....	27
Figure 40: Edit Page Action.....	29
Figure 41: Insert web part	29
Figure 42: Salesforce Chatter WebParts – My Site.....	29

<i>Figure 43: Page with My Site Web Part.....</i>	<i>30</i>
<i>Figure 44: My Site web part edit pane.....</i>	<i>30</i>
<i>Figure 45: Edit Page Action.....</i>	<i>32</i>
<i>Figure 46: Web Part Edit Menu</i>	<i>32</i>
<i>Figure 47: Delete web part confirmation box.....</i>	<i>33</i>
<i>Figure 48: User Access Details - List Settings button</i>	<i>33</i>
<i>Figure 49: User Access Details - List Settings Page</i>	<i>34</i>
<i>Figure 50: WebPartUrl - Change Column Page.....</i>	<i>34</i>
<i>Figure 51: Delete Column Confirmation Box.....</i>	<i>35</i>
<i>Figure 52: Delete User Access Details List Confirmation Box.....</i>	<i>35</i>
<i>Figure 53: Org Remote Access Details - List Settings Page</i>	<i>36</i>
<i>Figure 54: Delete Org Remote Access Details List Confirmation Box.....</i>	<i>36</i>
<i>Figure 55: Salesforce Chatter List Creation</i>	<i>37</i>
<i>Figure 56: Salesforce Chatter Team Site Web Part Feature</i>	<i>37</i>
<i>Figure 57: Salesforce Chatter My Site Web Part Feature.....</i>	<i>37</i>

1 Introduction

1.1 Purpose

The Deployment and Setup Guide is intended to provide assistance for installation and setup of the SharePoint 2010 Chatter Connector. The document is intended for the SharePoint Farm and Site Collection Administrator. SharePoint Administrators must have the understanding of SharePoint Solution Deployment/Retraction, SharePoint PowerShell and Feature Activation/Deactivation.

1.2 Setup Overview

SharePoint 2010 Chatter Connector setup comprises of following steps:

Step 1: SharePoint Chatter Connector Installation

Farm Administrator will install the SharePoint Connector Solution in SharePoint Farm using the provided scripts. Two different solutions “ChatterMiddleTier.wsp” and “SFChatterWebParts.wsp” will be added to SharePoint Farm.

Step 2: SharePoint Chatter Connector Deployment and Configuration

Farm Administrator will deploy the solution on the Web Application on which the connector needs to be used. Farm Administrator will also configure the Connector using the remote access details of Salesforce Chatter.

Step 3: Using SharePoint Chatter Connector

Site Collection Administrator will activate connector features to make the web part available for use. The Site Collection Administrator will also add and configure web part on a page.

Note: If the SharePoint Environment on which the installation needs to be done had previous versions of the SharePoint Chatter Connector, there might be few additional/alternate steps required during the deployment and setup of the connector. Additional information required for deployment will be provided as notes in similar manner.

1.3 Pre-Requisites

Following are the SharePoint 2010 Chatter Connector pre-requisites:

- SharePoint Server 2010.
- SharePoint Chatter Connector package.
- SharePoint 2010 Secure Web Application (Supported protocol HTTPS with CA signed SSL certificate).
- Windows PowerShell 2.0.
- Remote access configuration on Salesforce Chatter for each web application on which the connector needs to be used.

2 SharePoint Chatter Connector Installation

To perform the installation, user must have **Farm Administrative** permissions.

Note: If the SharePoint Environment on which the installation needs to be done had previous versions of the SharePoint Chatter Connector, the installation script will retract the solution from all web applications and remove the previous solution.

2.1 Package Verification

To verify that the package is complete please follow the steps provided below:

1. Copy "**Installables\ SP 2010**" folder on the "**C**" drive of SharePoint Server files system.
2. Open folder "**SP 2010**".
3. Open folder "**Build 1.0**".
4. Please verify following files are present in the folder.
 - a. ChatterMiddleTier.wsp
 - b. SFChatterWebParts.wsp
 - c. Install.bat
 - d. Script.ps1
5. In case any of the above files are not present in the folder, the package is incomplete. Please get a new copy of the SharePoint Chatter Connector package.

2.2 Solution Installation

To install "**ChatterMiddleTier.wsp**" and "**SFChatterWebParts.wsp**" solutions:

1. Open Folder "**Installables\SP 2010\ Build 1.0**" which was copied on the SharePoint Server files system in the previous step.
2. Open **Install.bat** in edit mode.

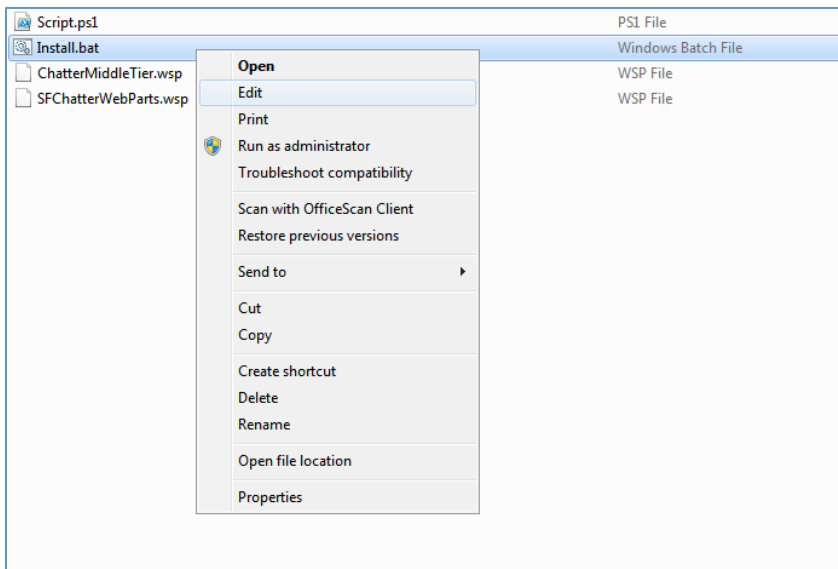


Figure 1 : Edit Install.bat

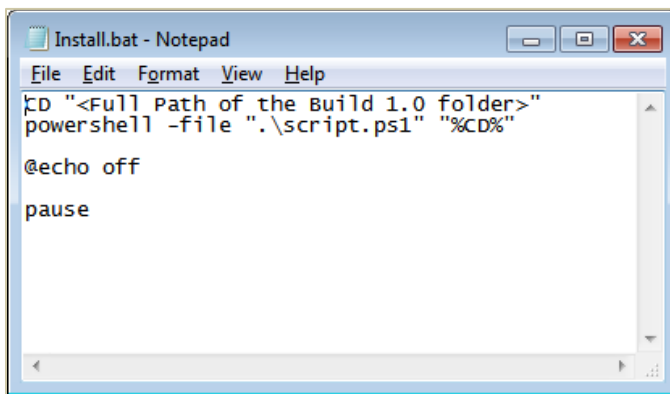


Figure 2: Install.bat before modification

3. Set the path of the **CD** parameter as the full path of the Build 1.0 folder.
In case, the Build 1.0 is at "C:\Installables\SP 2010\Build 1.0" location, then set the "CD" parameter as "C:\Installables\SP 2010\Build 1.0".

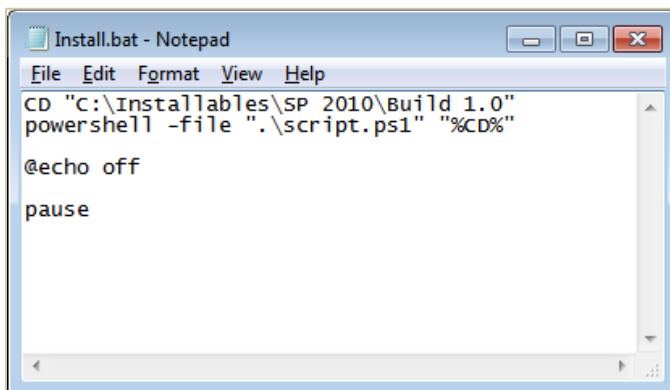


Figure 3: Install.bat post modification

4. Save the modified Install.bat and run as administrator. The solution installation will begin.

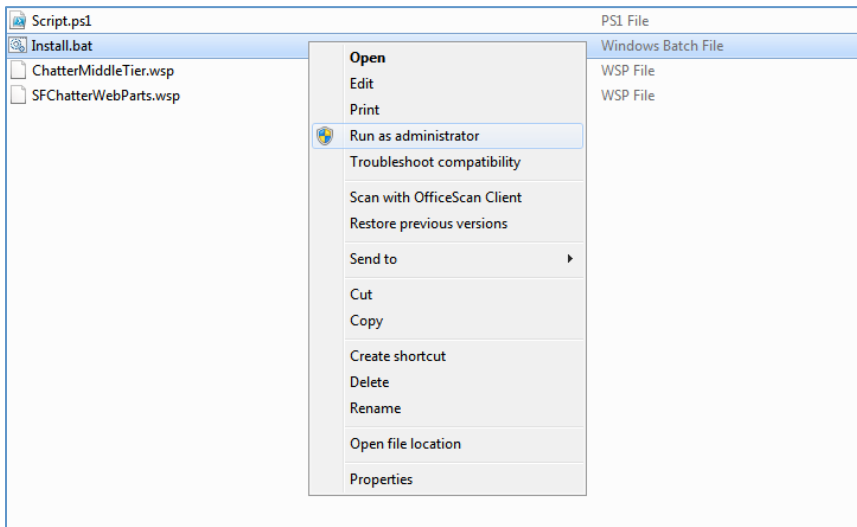


Figure 4: Install.bat run as administrator.

5. Once the installation is completed successfully, close the window.

2.3 Verify Solution Installation

To verify installation of “ChatterMiddleTier.wsp” and “SFChatterWebParts.wsp “:

1. Open **SharePoint 2010 Central Administration**.

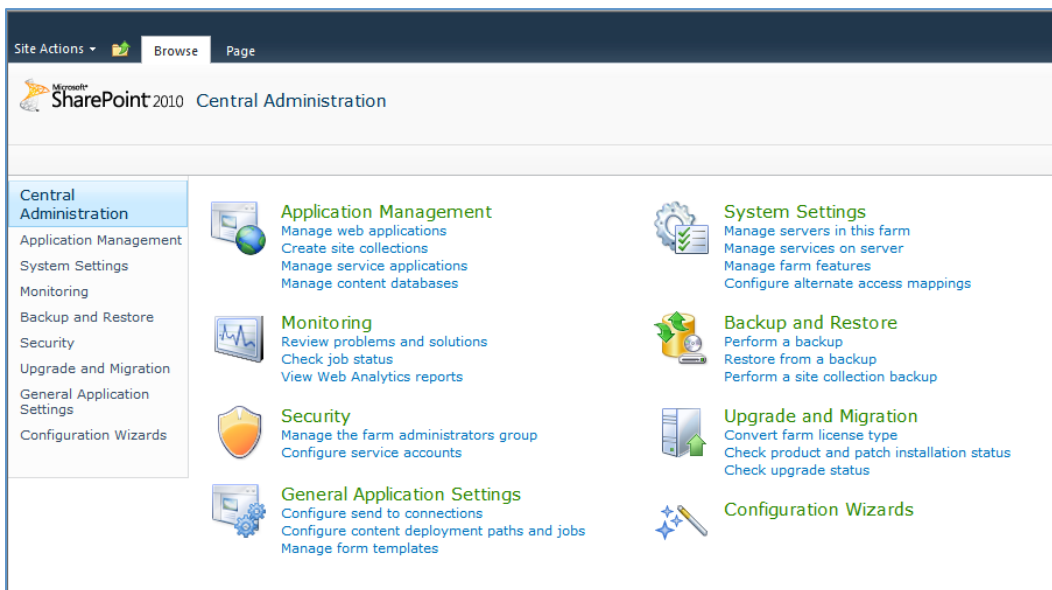


Figure 5: SharePoint 2010 Central Administration Home Page

2. Click **System Settings** in the Quick Launch bar (Links in the left section).
The **System Settings** page appears.

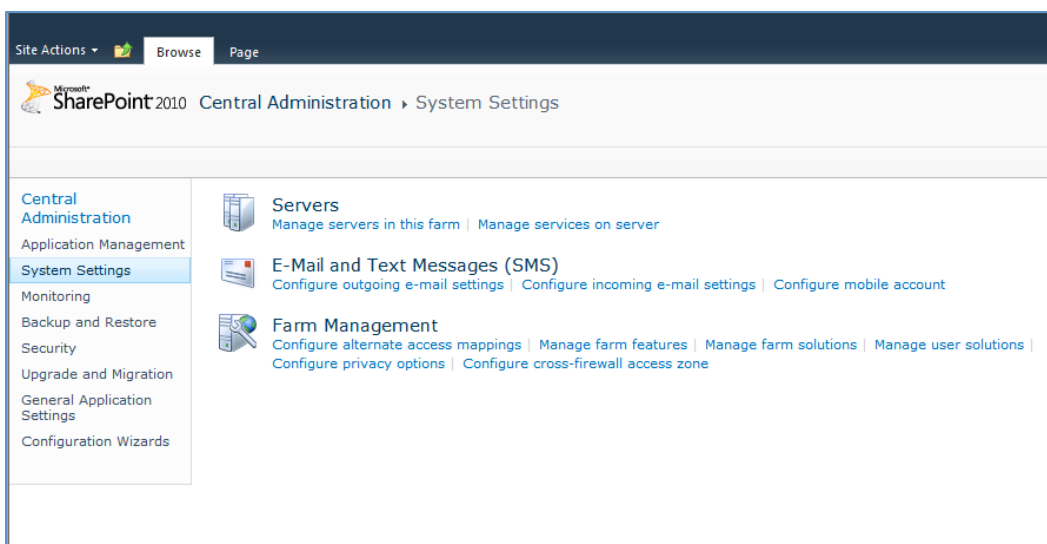


Figure 6: SharePoint System Settings Page

3. In **Farm Management** section click **Manage farm solutions**.

The **Solution Management** page appears.

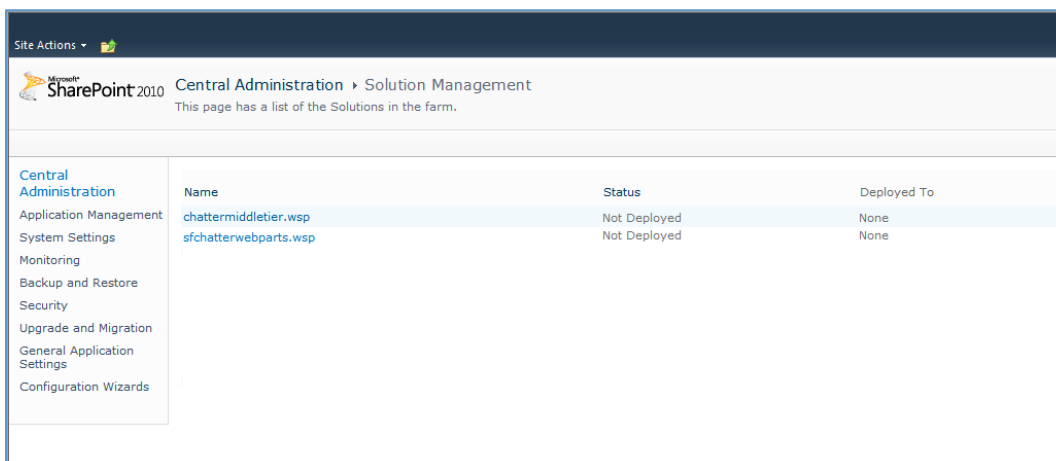


Figure 7: SharePoint Solution Management Page

4. Verify the **“ChatterMiddleTier.wsp”** and **“SFChatterWebParts.wsp”** solutions are present in the list of solutions.

Note: If the above solutions show that they are deployed on web application or globally deployed, then there might be error in retracting and removing the solution. You can manually retract and remove the solution and again run the Install.bat.

3 SharePoint Chatter Connector Deployment and Configuration

To perform deployment and configuration, user must have **Farm Administrative** permissions.

3.1 Deploy ChatterMiddleTier.wsp Solution

To deploy the **ChatterMiddleTier.wsp** solution:

1. Open **SharePoint 2010 Central Administration**.

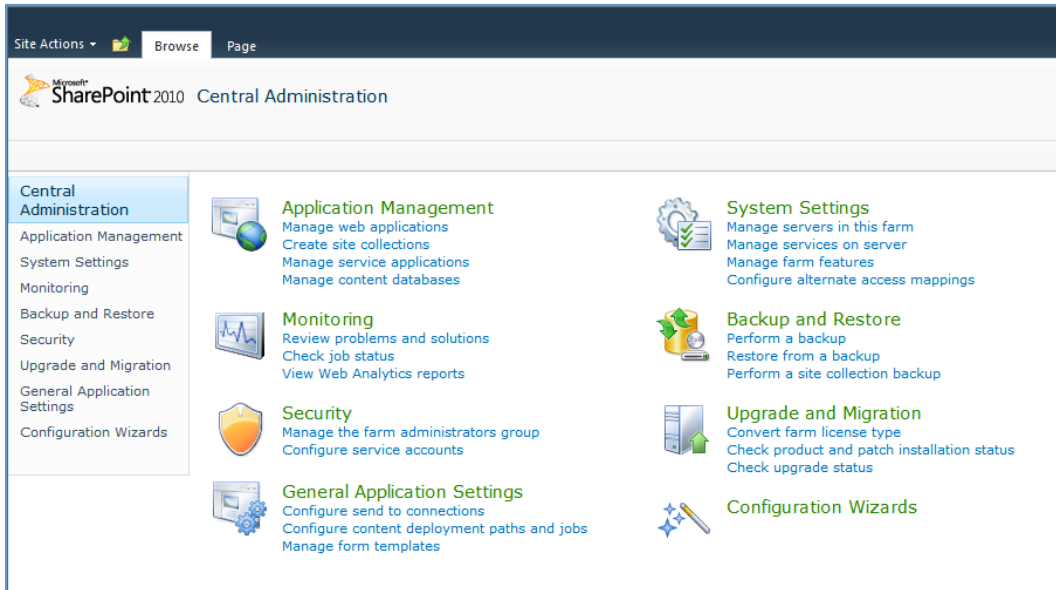


Figure 8: SharePoint 2010 Central Administration Home Page

2. Click **System Settings** in the Quick Launch bar (Links in the left section).
The **System Settings** page appears.

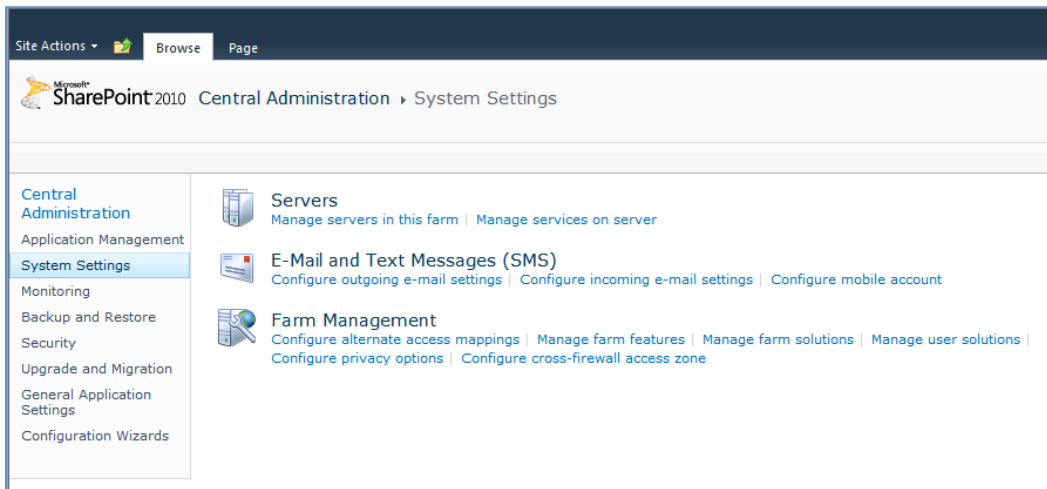


Figure 9: SharePoint System Settings Page

3. In **Farm Management** section click **Manage farm solutions**.

The **Solution Management** page appears.

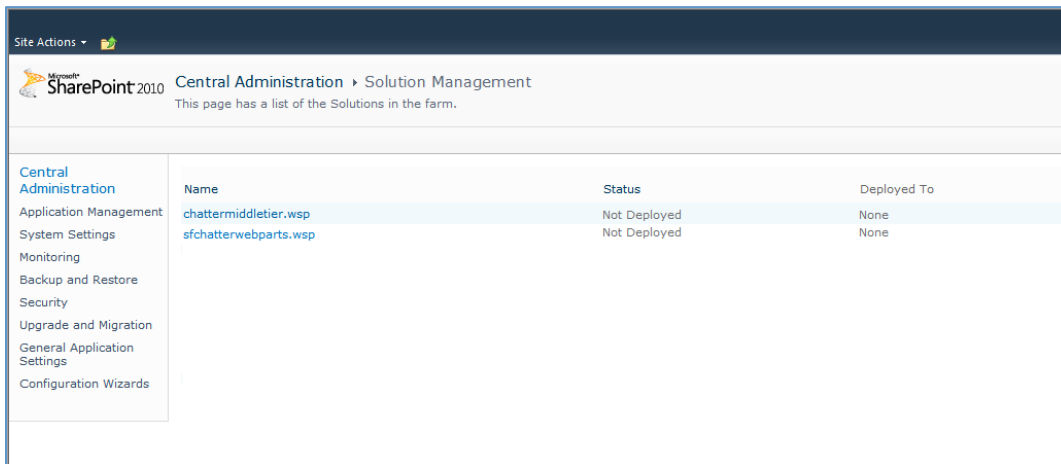


Figure 10: SharePoint Solution Management Page

4. Click **ChatterMiddleTier.wsp**.

The **Solution Properties** page appears.

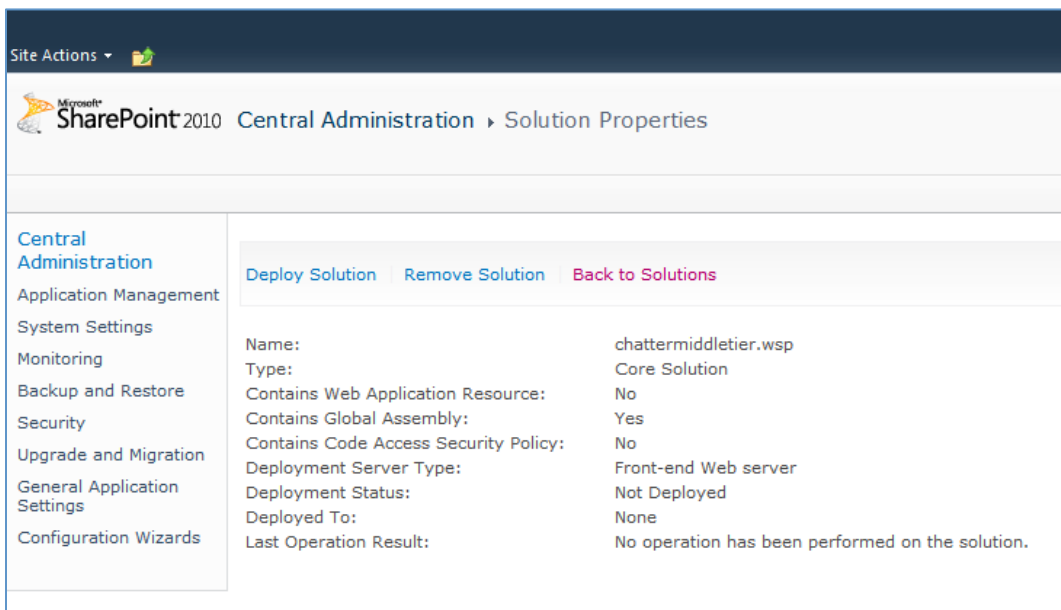


Figure 11: SharePoint Solution Properties Page

5. Click **Deploy Solution**.

The **Deploy Solution** page appears.

Site Actions ▾

Microsoft SharePoint 2010 Central Administration ▸ Deploy Solution
Use this page to deploy the solution.

Central Administration
Application Management
System Settings
Monitoring
Backup and Restore
Security
Upgrade and Migration
General Application Settings
Configuration Wizards

Solution Information
Information on the solution you have chosen to deploy.

Name: chattermiddletier.wsp
Locale: 0
Deployed To: None
Deployment Status:

Deploy When?
A timer job is created to deploy this solution. Please specify the time at which you want this solution to be deployed.

Choose when to deploy the solution:
☒ Now
☐ At a specified time:
 4/25/2012 12 PM 00

Deploy To?
The solution contains no Web application scoped resource, and therefore cannot be deployed to a particular Web application. It can only be deployed globally.

This solution deploys globally.

Warning: Deploying this solution will place assemblies in the global assembly cache. This will grant the solution assemblies full trust. Do not proceed unless you trust the solution provider.

OK Cancel

Figure 12: SharePoint Deploy Solution Page

- Click **OK**.
The **ChatterMiddleTier.wsp** is deployed globally.

3.2 Deploy SFChatterWebParts.wsp Solution

To deploy the **SFChatterWebParts.wsp** solution:

Note: **ChatterMiddleTier.wsp** solution needs to be deployed before the **SFChatterWebParts.wsp** solution.

- Open **SharePoint 2010 Central Administration**.

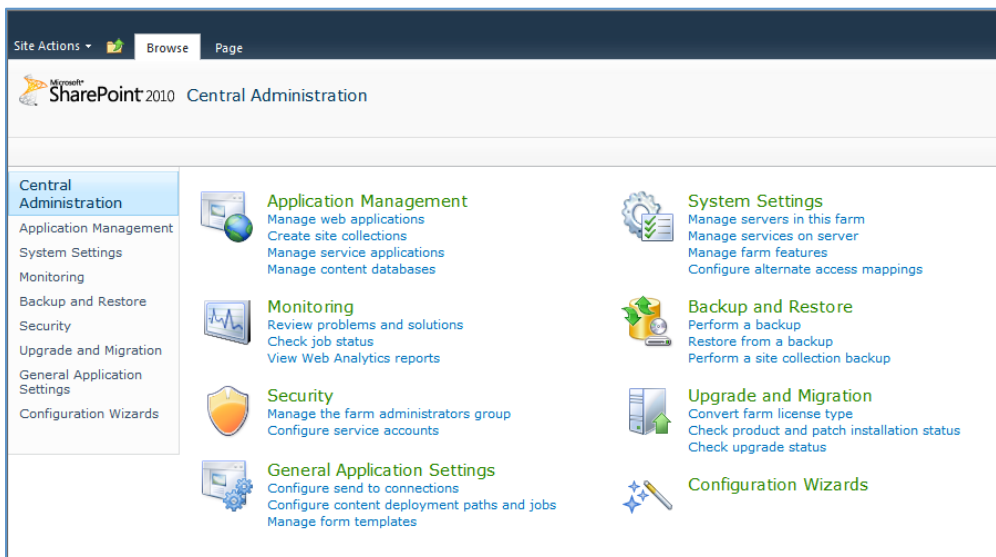


Figure 13: SharePoint 2010 Central Administration Home Page

- Click **System Settings** in the Quick Launch bar (Links in the left section).
The **System Settings** page appears.

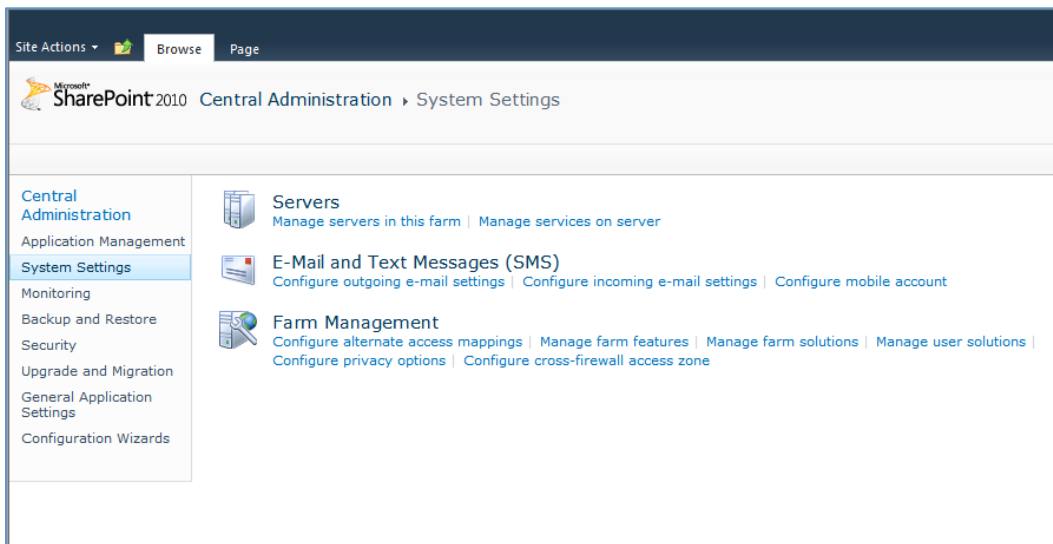


Figure 14: SharePoint System Settings Page

- In **Farm Management** section click **Manage farm solutions**.
The **Solution Management** page appears.

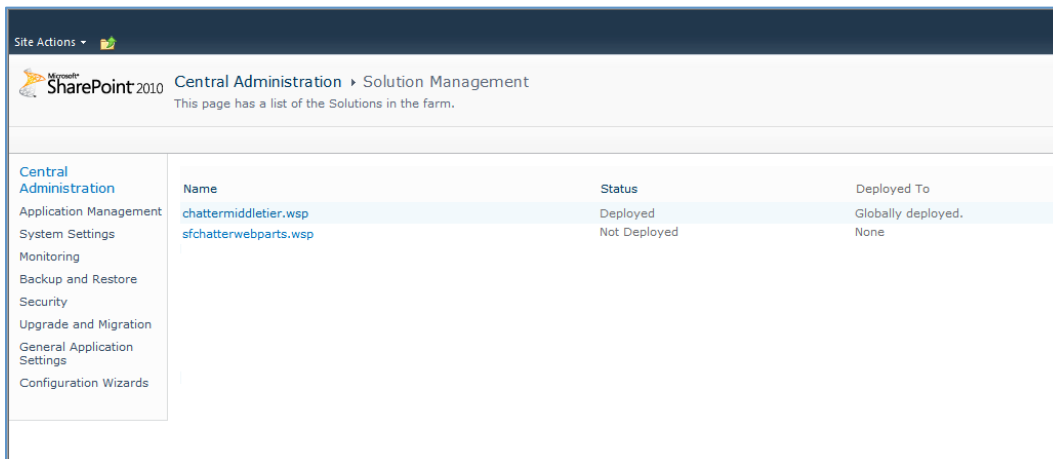


Figure 15: SharePoint Solution Management Page

- Click **SFChatterWebParts.wsp**.
The **Solution Properties** page appears.

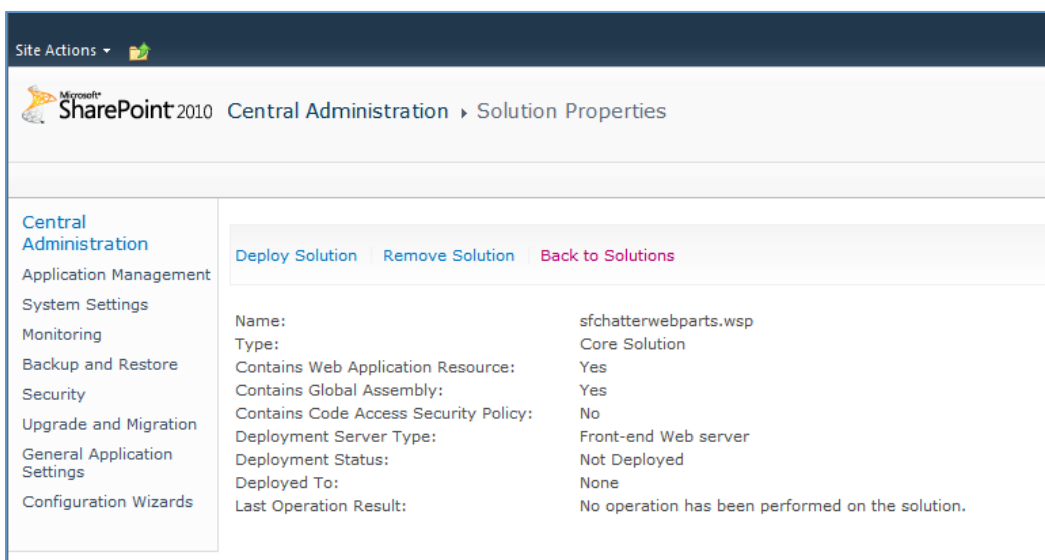


Figure 16: SharePoint Solution Properties Page

5. Click **Deploy Solution**.

The **Deploy Solution** page appears.

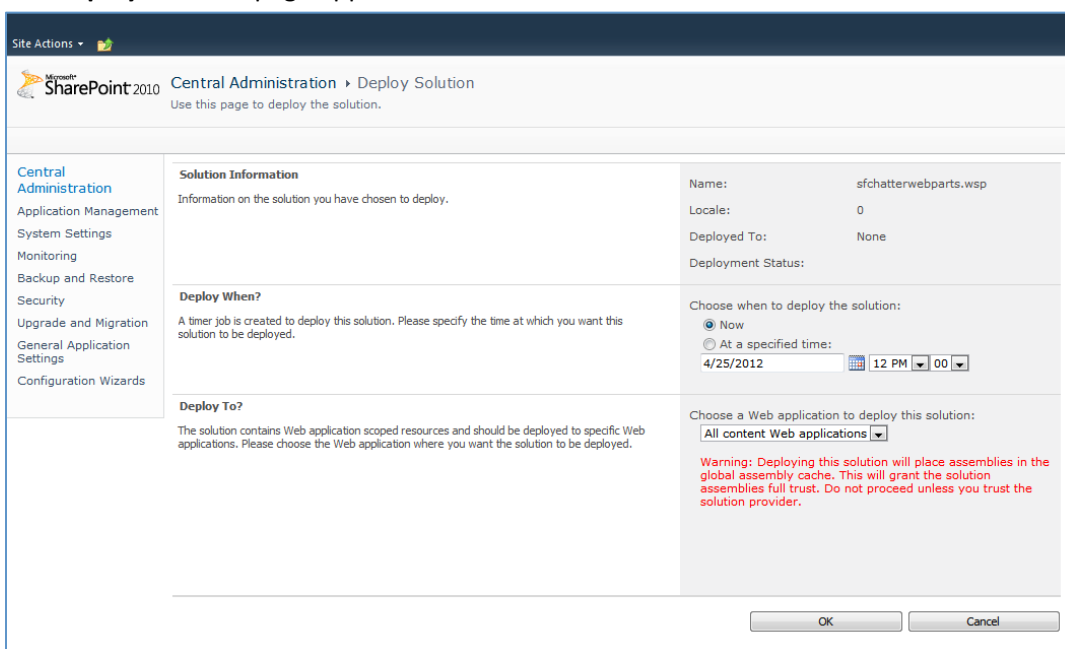


Figure 17: SharePoint Deploy Solution Page

6. In “**Deploy To?**” section select the Web Application on which the solution needs to be deployed. Note: The Chatter Connectors work only with https protocol even though SharePoint will allow deployment on http web applications, the remote access configuration will work Callback URL with https protocol.

7. Click **OK**.

The **SFChatterWebParts.wsp** is deployed for that web application. The solution can be deployed on multiple Web Applications at a time.

Note: The above step may result in an error if the previous version of the solution was deployed and activated on multiple web applications or site collection. In that case the deployment needs to be done using following PowerShell Command using **-force** parameter.

Install-SPSolution -Identity "SFChatterWebParts.wsp" -GACDeployment -WebApplication {WebAppUrl} -Force

Replace the {WebAppUrl} with the Web Application URL on which the solution needs to be deployed and run it using **SharePoint 2010 Management Shell**

3.3 Deploy Application Content

The Chatter Connector uses some resources. After deployment SharePoint might take time to copy those resources in to the local folders of web application. Due to this there might be issues following the further steps. The process of copying the resources can be done by following PowerShell Command:

Install-SPApplicationContent

To deploy application content:

1. Open **SharePoint 2010 Management Shell** with administrative permissions.
2. Run the **Install-SPApplicationContent** command.

Deploy Application Content is complete.

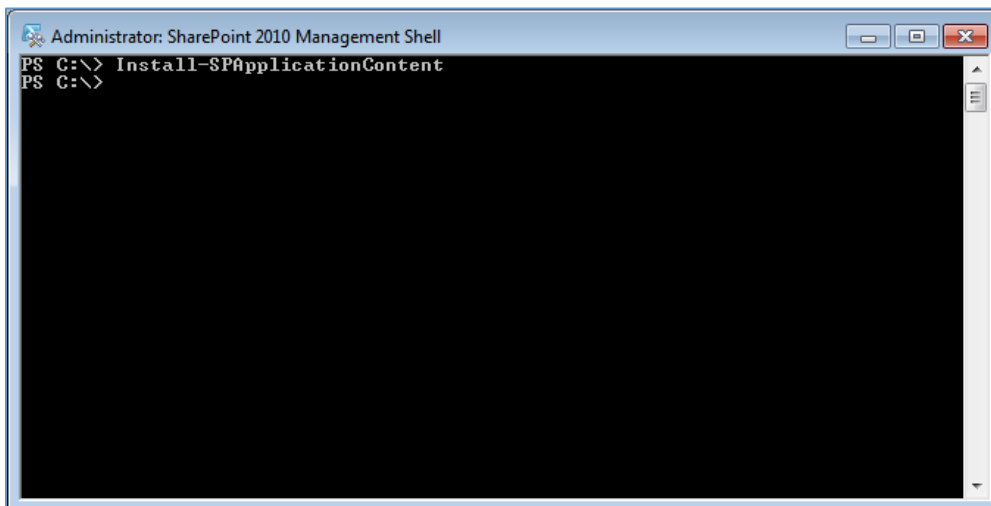


Figure 18: SharePoint 2010 Management Shell

3.4 Chatter Connector Settings

To configure the Chatter Connector:

1. Open **SharePoint 2010 Central Administration**.

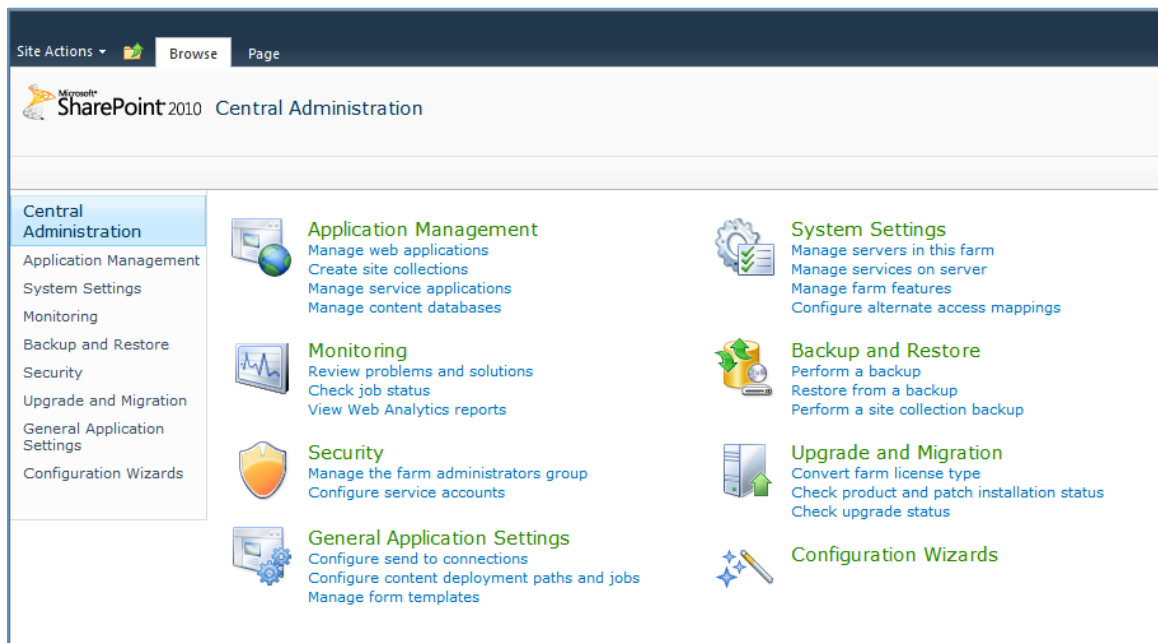


Figure 19: SharePoint 2010 Central Administration Home Page

2. Click **Application Management** in the Quick Launch bar (Links in the left section).
The **Application Management** page appears.

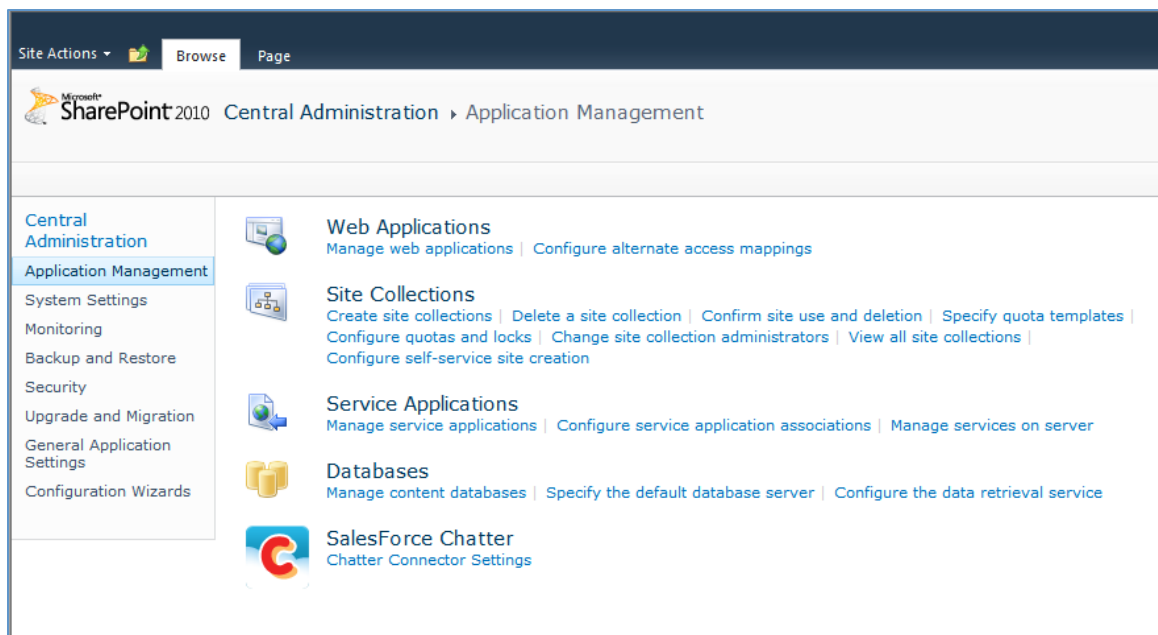


Figure 20: SharePoint Application Management Page

3. In **SalesForce Chatter** section click **Chatter Connector Settings**.
The **Chatter Connector Settings** page appears.

Site Actions ▾

SharePoint 2010 Central Administration > SharePoint Chatter Connector Settings

I Like It Tags & Notes

OK Cancel

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Configuration Wizards

Recycle Bin

All Site Content

Web Application

Select a web application.

Web Application:

https:// /

Web applications on which Chatter Solution is deployed will be available. If web application not available please verify the Chatter Solution is deployed.

Chatter Remote Access Details

A Remote Access Application with the provided call back URL needs to be registered on Salesforce.

Enter the Consumer Key of the Remote Access Application registered for this Callback URL.

Enter the Consumer Secret of the Remote Access Application registered for this Callback URL.

Chatter Callback URL:

https:// /_layouts/SFChatter

Consumer Key:

Consumer Secret:

Chatter Environment Settings

Set the Chatter API Base URL. This value specifies the API version used by the Connector.

Set Authorization URL. This URL is used to Authenticate to Chatter Portal.

Set Access Token URL. This URL is used to request the Access Token.

Chatter ABI Base URL:

/services/data/v23.0/chatter

Chatter Authorization URL:

https://login.salesforce.com/services/o

Chatter Access Token URL:

https://login.salesforce.com/services/o

Chatter SharePoint Connector Settings

Set the Encryption Key. This value is used for encryption and decryption of the Refresh and Access Tokens.

Set the auto refresh timer interval. This value defines the time interval for auto refresh of a web part.

Set auto complete search user count. This value is used to set the number of users displayed for mention search.

To allow users to upload of SharePoint files on Chatter set this value. Yes. If this value is set as No the files will be posted as links.

Encryption Key:

Not shown for security reasons

Auto Refresh Timer (milliseconds):

180000

Auto Complete User Count:

50

Allow Upload of SharePoint files:

☐ Yes ☒ No

OK Cancel

Figure 21: Chatter Connector Settings Page

4. In the **Web Application** section select the Web Application for which the configurations need to be done.

Web Application

Select a web application.

Web Application:

https:// /

Web applications on which Chatter Solution is deployed will be available. If web application not available please verify the Chatter Solution is deployed.

Figure 22: Chatter Connector Settings Page – Web Application

Note: If the configurations are being added for the first time then the default values for some fields will be shown, if not the previous values will be fetched from the configurations. Some values are not shown due to security reasons.

5. Use the default value provided in the **Chatter Callback URL** to setup a remote access application at Salesforce Chatter.

Figure 23: Chatter Connector Settings Page – Chatter Remote Access Details

The URL can be modified in case of Alternate Access Mapping or Extended Web Application. The format of the URL must be:

https://{webapplication}/_layouts/SFChatterWP/oAuthLoginPage.aspx

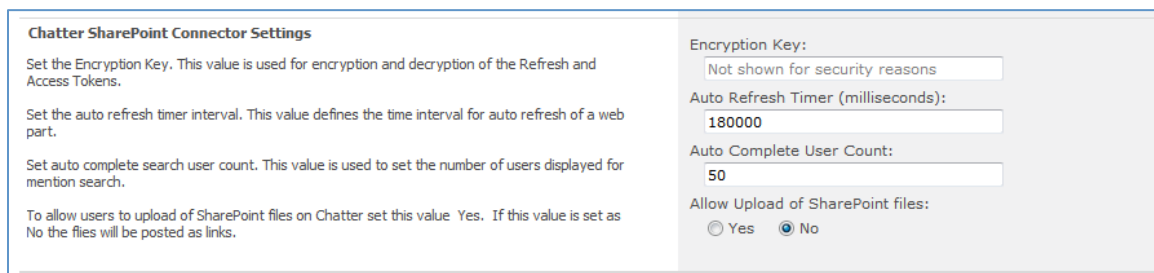
Note: Only one Call back URL can be setup per Web Application. If the Web Application uses multiple Alternate Access Mappings only one can be supported.

6. Enter the **Consumer Key** which was generated by Salesforce Chatter when Remote Access Application was registered.
7. Enter the **Consumer Secret** which was generated by Salesforce Chatter when Remote Access Application was registered.
8. The **Chatter API Base URL** has a default value. This URL provides the version of the API which needs to be used.

Figure 24: Chatter Connector Settings Page – Chatter Environment Settings

9. The **Chatter Authorization URL** has a default value. This URL is used for Authorization to the Salesforce Chatter environment.
10. The **Chatter Access Token URL** has a default value. This URL is used fetch Access Tokens from the Salesforce Chatter environment.

11. The **Encryption Key** has a default value. This value is not shown for security reasons. You can change the Encryption Key. The Encryption Key must be 16 Character. If the Encryption Key is modified the stored refresh token and access tokens need to be removed manually.



Chatter SharePoint Connector Settings	
Set the Encryption Key. This value is used for encryption and decryption of the Refresh and Access Tokens.	Encryption Key: Not shown for security reasons
Set the auto refresh timer interval. This value defines the time interval for auto refresh of a web part.	Auto Refresh Timer (milliseconds): 180000
Set auto complete search user count. This value is used to set the number of users displayed for mention search.	Auto Complete User Count: 50
To allow users to upload of SharePoint files on Chatter set this value. Yes. If this value is set as No the files will be posted as links.	Allow Upload of SharePoint files: ☐ Yes ☒ No

Figure 25: Chatter Connector Settings Page – Chatter SharePoint Connector Settings

12. The **Auto Refresh Timer** has a default value. This value is used to auto refresh the web part.
13. The **Auto Complete User Count** has a default value. This value is used to set the man number of users displayed in mentions.
14. The **Allow upload of SharePoint Files** value is used to allow users to upload SharePoint files to Chatter. If this value is no the users will only be able to publish link on Chatter.
15. Click **OK**.

The configurations for the web application are completed.

3.5 Maximum File uploads setting for Web Part

Chatter Connector supports file upload of max 100 MB. SharePoint has a configuration to restrict the Maximum Upload Size. To allow the max upload of 100 MB modification need to be done in SharePoint.

Note: This is an optional step it is only to set the max upload size of documents.

To modify the Maximum Upload Size:

1. Open **SharePoint 2010 Central Administration**.

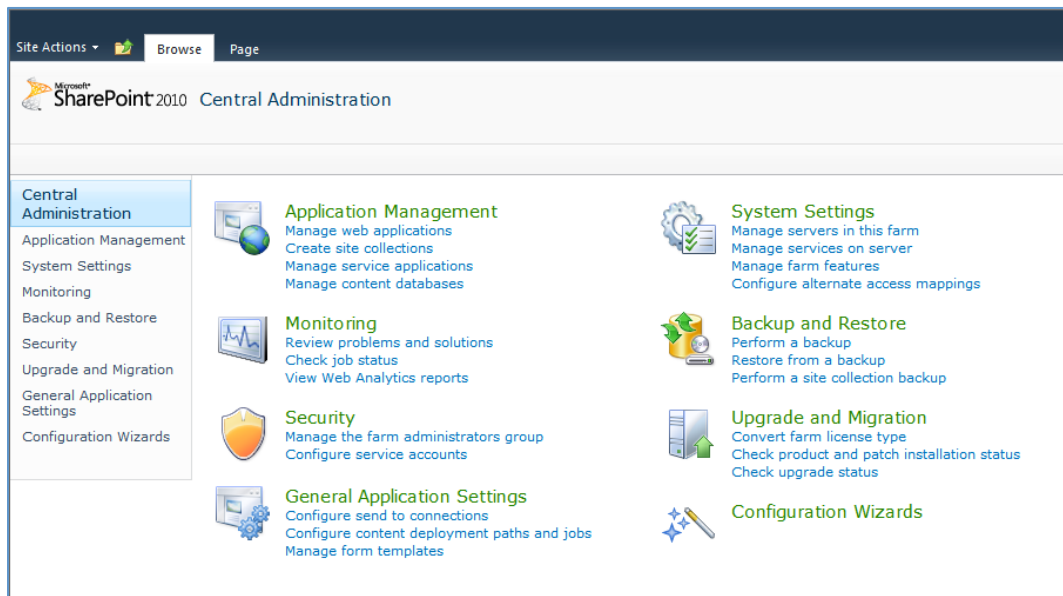


Figure 26: SharePoint 2010 Central Administration Home Page

2. Click **Application Management** in the Quick Launch bar (Links in the left section).
The **Application Management** page appears.

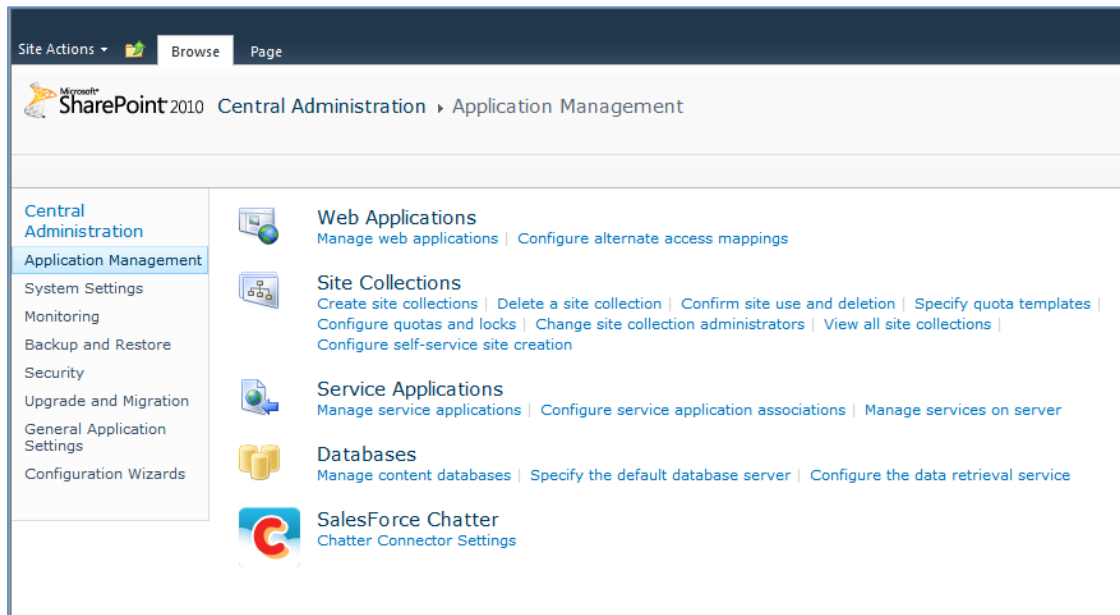


Figure 27: SharePoint Application Management Page

3. In **Web Application** section click **Manage Web Applications**.
The **Manage Web Applications** page appears.

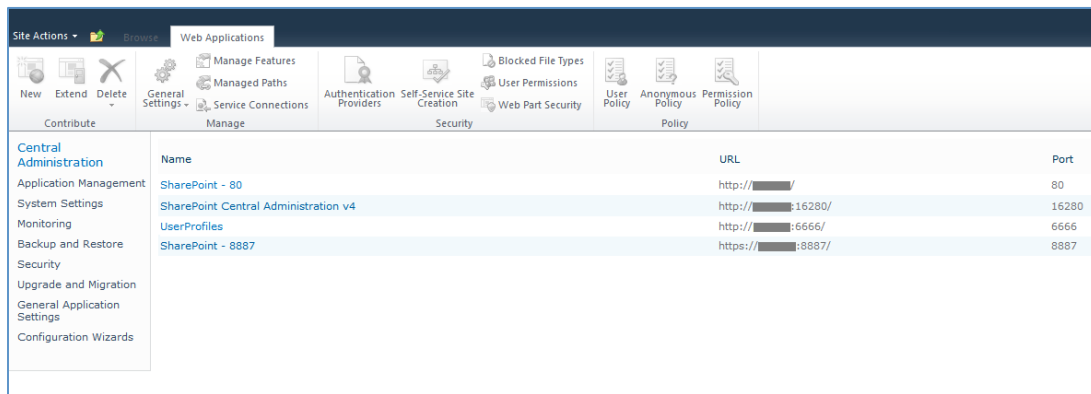


Figure 28: Manage Web Applications Page

4. Select the Web Application for which the modification needs to be made.
5. On Ribbon, in the **Manage** Section open **General Settings -> General Settings**.

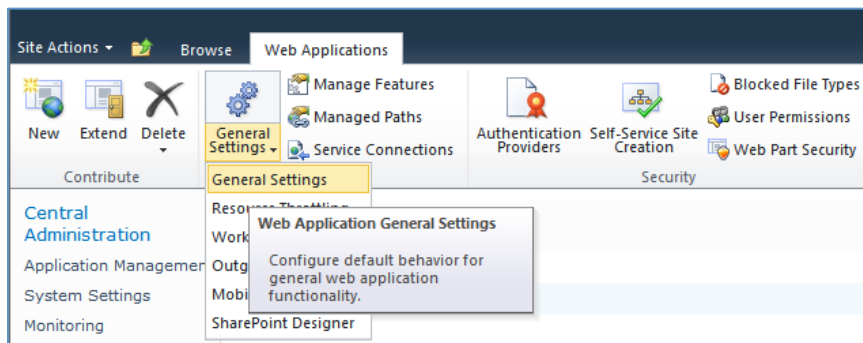


Figure 29: Web Application General Settings Menu

The **Web Application General Settings** page appears.

Web Application General Settings

OK Cancel

Default Time Zone Choose the time zone for sites that get created on this web application.	Select time zone
Default Quota Template Select the quota template used by default for all site collections. Click Quota Templates to define new quota templates.	Select quota template No Quota Storage limit: Number of invited users:
Person Name Actions and Presence Settings With additional actions and Online Status enabled, online presence information is displayed next to member names and the additional actions appear when users right-click on a member name anywhere on this site.	Enable additional actions and Online Status for members: ☒ Yes ☐ No
Alerts Specify the default settings for alerts on this Web application.	Alerts on this server are: ☒ On ☐ Off Maximum number of alerts that a user can create: ☒ 500 ☐ Unlimited number
RSS Settings Specify the server-wide settings for RSS feeds.	Enable RSS feeds: ☒ Yes ☐ No
Blog API Settings Choose whether or not to enable the MetaWeblog API for this web application. If the setting to accept user name and password is off, the currently configured authentication method will be used.	Enable Blog API: ☒ Yes ☐ No Accept user name and password from the API: ☐ Yes ☒ No

Figure 30: Web Application General Settings Page

6. In the **Maximum Upload Size** change the value to 100 in case it is less than 100 MB.

Web Application General Settings

OK Cancel

The second stage Recycle Bin stores items that end users have deleted from their Recycle Bin for easier restore if needed. Learn about configuring the Recycle Bin.	☒ Add 50 percent of live site quota for second stage deleted items. ☐ Off
Maximum Upload Size Specify the maximum size to allow for a single upload to any site. No single file, group of files, or content, can be uploaded if the combined size is greater than this setting.	Maximum upload size: 100 MB
Customer Experience Improvement Program Collect web site analytics about web pages on this web application. Please read the Administration guide before turning this on for web applications available over the public Internet.	Enable Customer Experience Improvement Program ☐ Yes ☒ No Warning: In order for Customer Experience Improvement Program (CEIP) to collect data, both CEIP and browser CEIP, at the farm level, should be enabled.

Figure 31: Web Application General Settings Page – Maximum Upload Size

7. Click **OK**.

The Maximum Upload Size is modified for SharePoint.

Note: The upload file to Chatter depends on the connect speed. Thus for slow connection the Request Time Out might have to be modified in the web.config of the web application. Please modify the request time out as below:

```
<httpRuntime maxRequestLength="102400" executionTimeout="1200" />
```

This modification needs to be done on each web front end server of SharePoint.

4 Using SharePoint Chatter Connector

To perform the activation of connector feature, user must have **Site Collection Administrative** permissions.

4.1 Enabling Features for the Site Collection and Site

To enable the Site Collection and Site features:

1. Log on to the Site Collection on which the Web Part needs to be added.
2. In the **Site Actions** list, click **Site Settings**.
The **Site Settings** page appears.
3. In the **Site Collection Administration** area, click **Site Collection Features**.
The **Features** page appears.
4. Click **Activate** for the **SalesForce Chatter Team Site Web Part** feature.

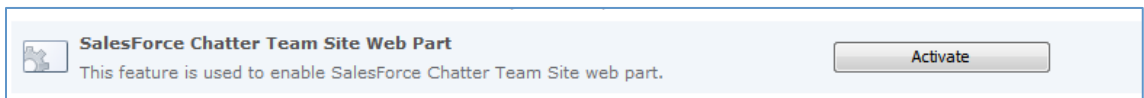


Figure 32: SalesForce Chatter Team Site Web Part Feature

The **SalesForce Chatter Team Site Web Part** feature is activated.

5. Click **Activate** for the **SalesForce Chatter My Site Web Part** feature.

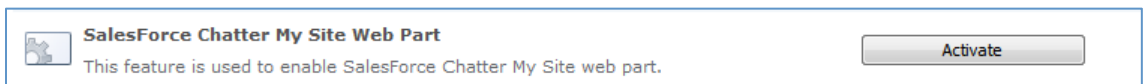


Figure 33: SalesForce Chatter My Site Web Part Feature

The **SalesForce Chatter My Site Web Part** feature is activated.

6. In the **Site Actions** list, click **Site Settings**.
The **Site Settings** page appears.
7. In the **Site Actions** area, click **Manage site features**.
The **Features** page appears.
8. Click **Activate** for the **SalesForce Chatter List Creation** feature.

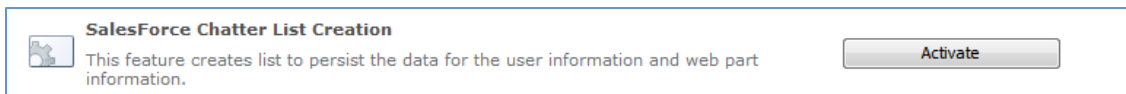


Figure 34: SalesForce Chatter List Creation

The **SalesForce Chatter List Creation** feature is activated.

4.2 Verify List Creation for the Site

To verify the lists created:

1. Access **User Access Details**. To access the list use the following URL format.
<http://<SiteUrl>/lists/User Access Details>.

2. This list should have **UserID**, **Refresh token**, **Access Token**, **Group ID**, **Instance URL** and **WebpartUrl** columns. (**WebpartUrl** column would be look up column with the **ID** column of the **Org Remote Access Details** SharePoint list)
 3. Access **Org Remote Access Details**. To access the list use the following URL format.
<http://<SiteUrl>/lists/Org Remote Access Details>
 4. This list should have **Callback URL**, **AllowPostFile** and **Groups** columns.
- Note:** Only Admin can be able to view this list. Some information will remain in encrypted format in the SharePoint list.

4.3 Add Team Site Web part to SharePoint Site

To add Team Site Web part to SharePoint Site:

1. Browse the SharePoint Page on which the Web Part needs to be added.
2. In the **Site Actions** list, click **Edit Page**.

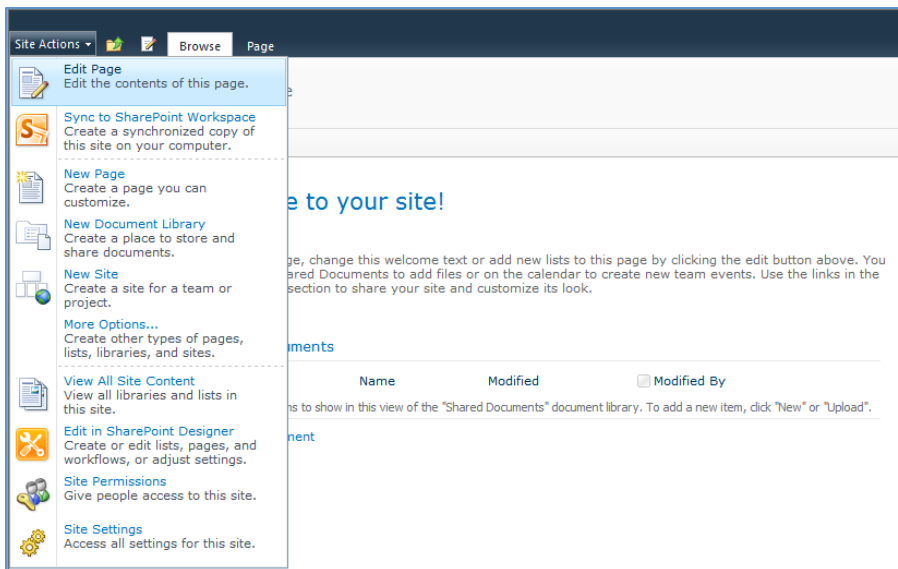


Figure 35: Edit Page Action

The page opens in Edit Mode.

3. On the **Inset** tab, click **Web Part**
Web part insertion section opens.

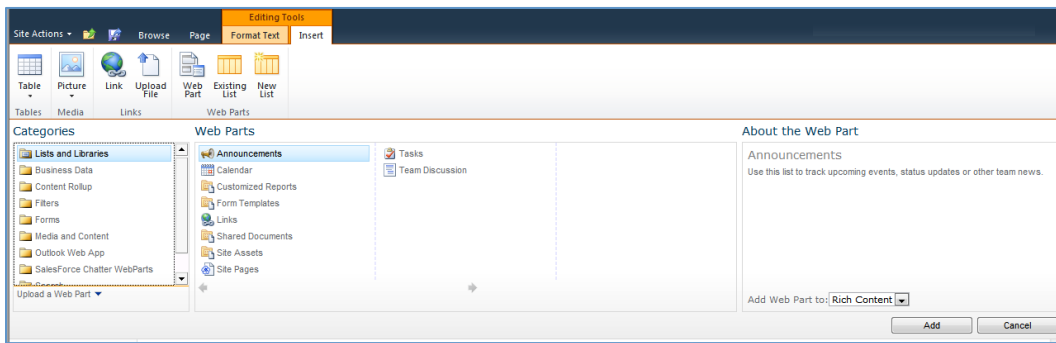


Figure 36: Insert web part section

4. In the **Categories** area, click **SalesForce Chatter Web Part**.
5. In the **Web Parts** area, click **Chatter Team Site Web Part**.

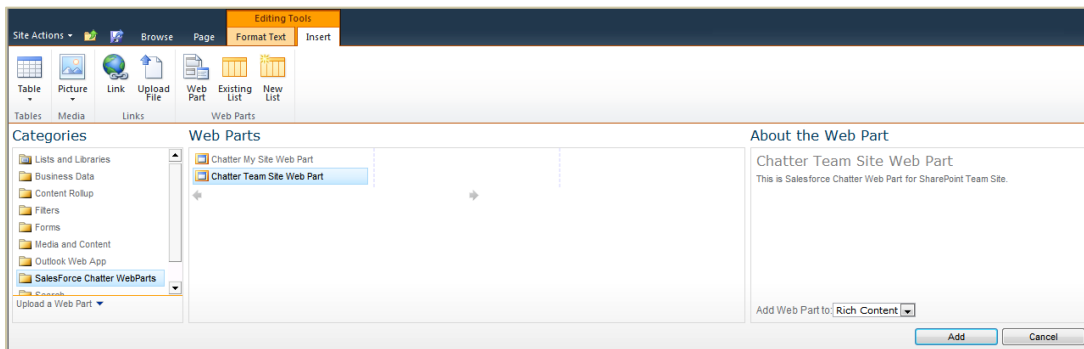


Figure 37: Salesforce Chatter WebParts – Team Site

6. In the **About the Web Part** area, in the **Add Web Part to** list, select the location where web part needs to be added.
7. Click **Add**.

The Web part is added to the page.

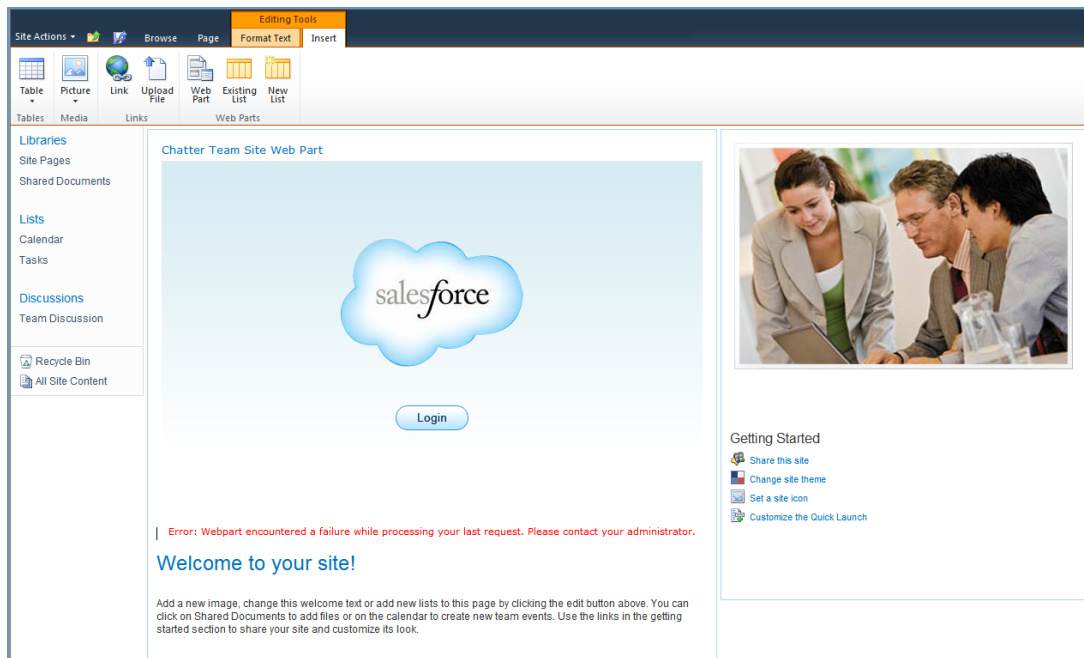


Figure 38: Page with Team Site Web Part

4.4 Configure Team Site Web part

To configure Team Site Web part:

1. Click on the arrow button on right hand side of the web part in the Title area.
2. Click **Edit Web Part**.

Web Part Edit pane appears.

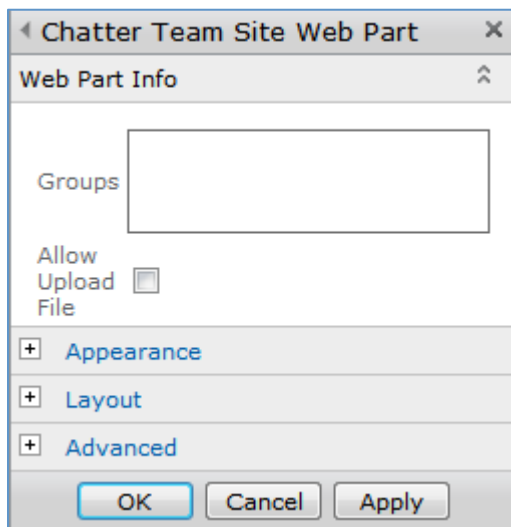


Figure 39: Team Site web part edit pane.

3. In the **Groups** enter the group ids which team site web part need to support.
If you want to input multiple groups please separate it with enter.

If no groups are selected, users can search and configure any group.

4. Select the **Allow upload file** to allow users to upload SharePoint file to Chatter.
Similar configuration is done at Web application level. Only if allow upload is enabled at web application level and Web part level, user will be able to upload the SharePoint file to Chatter, else they will only be able to publish link of SharePoint files.
5. Click on **Apply** and **OK** to save the properties of the web part.
6. Click the **Save and close** option on the page ribbon.

The Web Part configuration is complete. The Team Site web part is ready for use.

4.5 How to Work with Team Chatter Web part

To work with Team Site Web Part:

1. Browse to the page on which web part is configured.
2. Click on Login button of the Chatter web part
3. For the first time, user will be redirected to the Salesforce site for authentication.
4. Once user logs in, user will be redirected to the SharePoint site.
5. User needs to select one of the groups in the drop down box.
If single group is select the user won't be given dropdown option.
If no groups are configured user will be provided with a search box.
6. Once user selects the Group from the Groups dropdown or search results, all the feeds for the selected group will be shown.
7. The selected group is persisted for the subsequent logins.

Note: If there are any issues with the web part and there was previous versions installed on this site collection it might be due to the user and web part data from previous version. To clean up the previous data please perform following Steps:

1. [Remove Web Part from Page \(section 5.1\)](#)
2. [Delete SharePoint Lists \(section 5.2\)](#)
3. [Deactivate Features\(section 5.3\)](#)

After the above cleanup is completed all the steps of Section will have to be done again.

4.6 Add My Site Web part to SharePoint Site

To add My Site Web part to SharePoint Site:

1. Browse the SharePoint Page on which the Web Part needs to be added.
2. In the **Site Actions** list, click **Edit Page**.

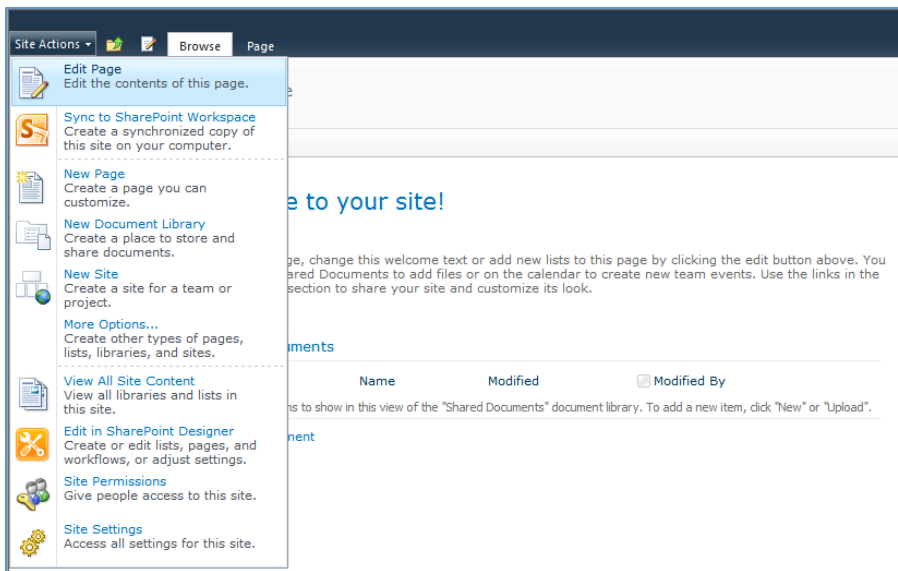


Figure 40: Edit Page Action

The page opens in Edit Mode.

3. On the **Inset** tab, click **Web Part**
Web part insertion section opens.

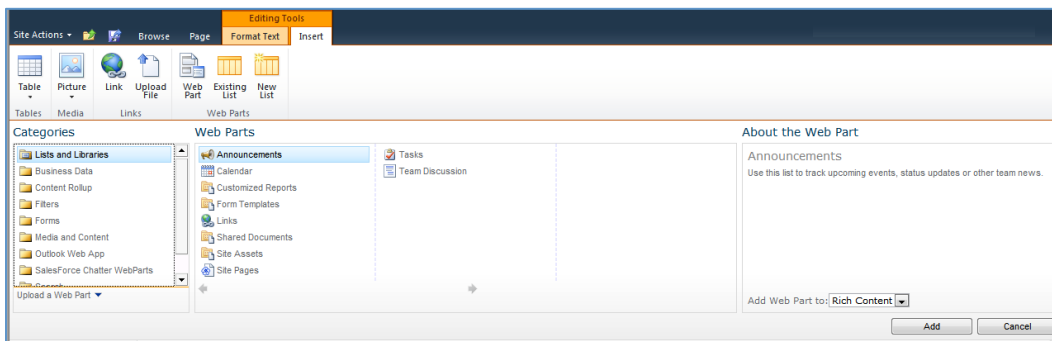


Figure 41: Insert web part

4. In the **Categories** area, click **SalesForce Chatter Web Part**.
5. In the **Web Parts** area, click **Chatter My Site Web Part**.

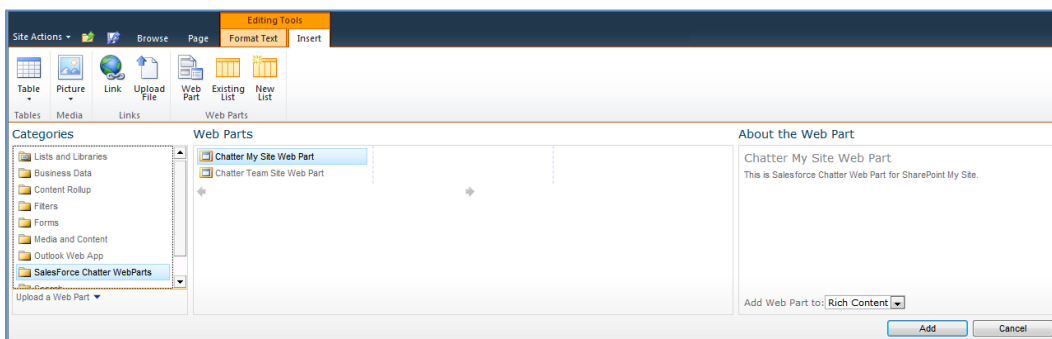


Figure 42: Salesforce Chatter WebParts – My Site

6. In the **About the Web Part** area, in the **Add Web Part to** list, select the location where web part needs to be added.
7. Click **Add**.

The Web part is added to the page.

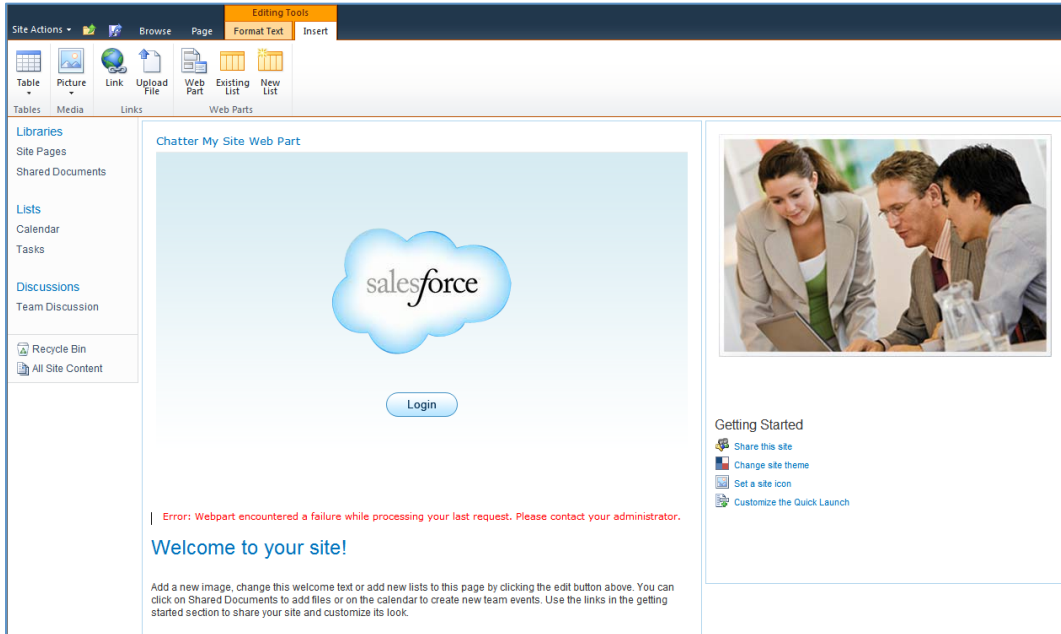


Figure 43: Page with My Site Web Part

4.7 Configure My Site Web part

To configure My Site Web part:

1. Click on the arrow button on right hand side of the web part in the Title area.
2. Click **Edit Web Part**.

Web Part Edit pane appears.

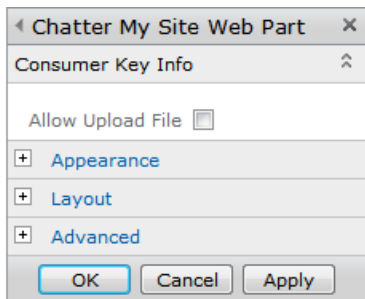


Figure 44: My Site web part edit pane

3. Select the **Allow upload file** to allow users to upload SharePoint file to Chatter. Similar configuration is done at Web application level. Only if allow upload is enabled at web application level and Web part level, user will be able to upload the SharePoint file to Chatter, else they will only be able to publish link of SharePoint files.

4. Click on **Apply** and **OK** to save the properties of the web part.
 5. Click the **Save and close** option on the page ribbon.
- The Web Part configuration is complete. The My Site web part is ready for use.

4.8 How to Work with MySite Chatter Web part

To work with My Site Web Part:

1. Browse to the page on which web part is configured.
2. Click on Login button of the Chatter web part
3. For the first time, user will be redirected to the Salesforce site for authentication.
4. Once user logs in, user will be redirected to the SharePoint site.
5. All the feeds for the user will be shown.
6. By default the **My Chatter** will be selected.

Note: If there are any issues with the web part and there was previous versions installed on this site collection it might be due to the user data and web part data from previous version. To clean up the previous data please perform following Steps:

1. [Remove Web Part from Page \(section 5.1\)](#)
2. [Delete SharePoint Lists \(section 5.2\)](#)
3. [Deactivate Features\(section 5.3\)](#)

After the above cleanup is completed all the steps of Section will have to be done again.

5 Other

5.1 Remove Web Part from Page

To remove Web Part from Page:

1. Log on to the Site Collection and browser the web part from which the Web Part needs to be removed.
2. Browse the SharePoint Page on which the Web Part needs to be added.
3. In the **Site Actions** list, click **Edit Page**.

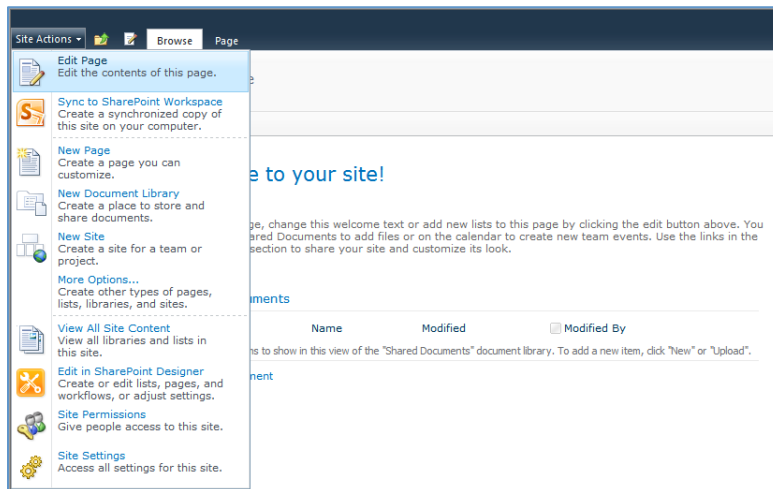


Figure 45: Edit Page Action

The page opens in Edit Mode.

4. Click on the arrow button on right hand side of the web part in the Title area.

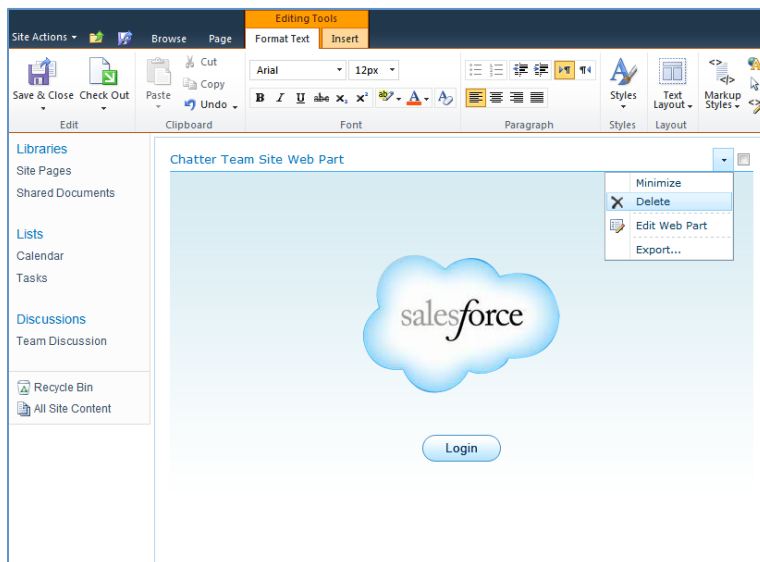


Figure 46: Web Part Edit Menu

5. Click **Delete**.

A confirmation box appears.

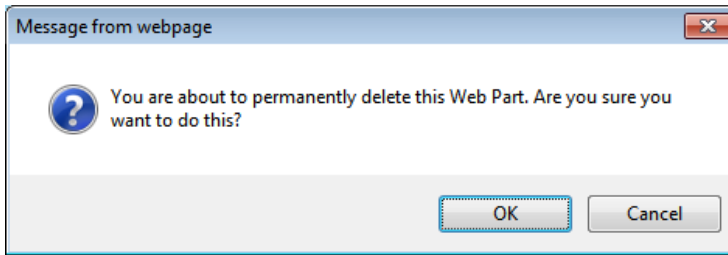


Figure 47: Delete web part confirmation box

6. Click **OK**.
The web part is removed from the page.
7. Click the **Save and close** option on the page ribbon.

5.2 Delete SharePoint Lists

To delete the Chatter List from Site:

1. Log on to the Site from which the lists need to be deleted.
2. Access the **User Access Details** list using the following URL structure.
<http://<SiteUrl>/lists/User Access Details>
Replace the <SiteUrl> with base URL of the site from which the list needs to be deleted.
3. In the **List** tab on ribbon, click **List Settings** button.

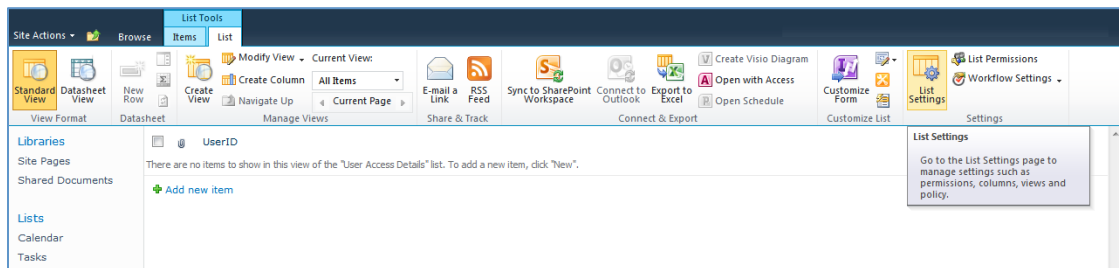


Figure 48: User Access Details - List Settings button

List Settings page appears.

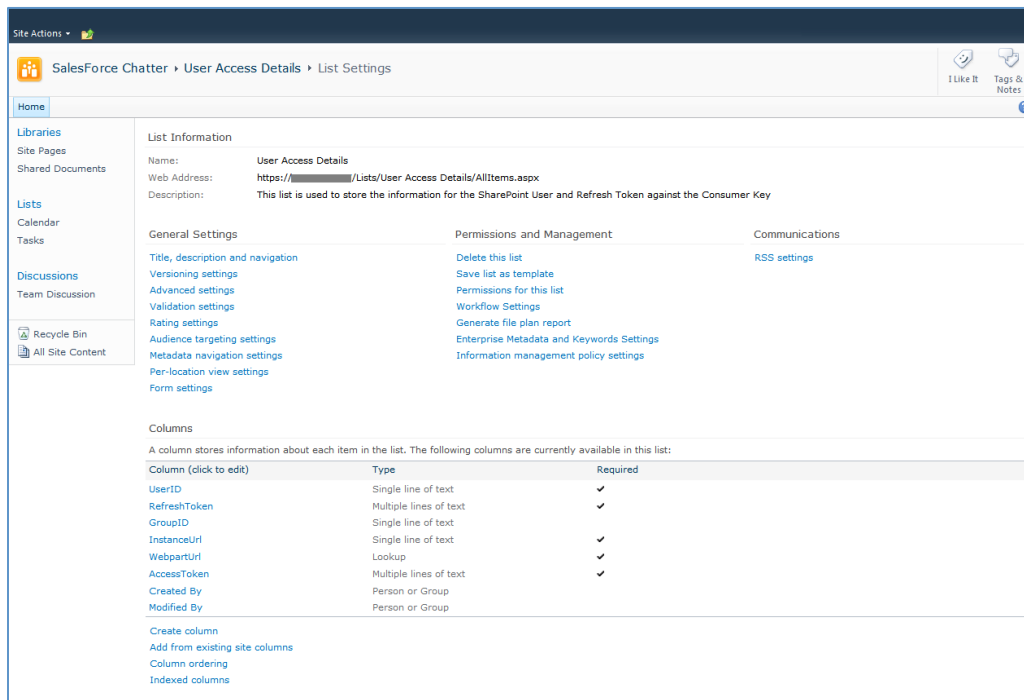


Figure 49: User Access Details - List Settings Page

- Under **Column** section click **WebPartUrl**.
Change Column page appears.

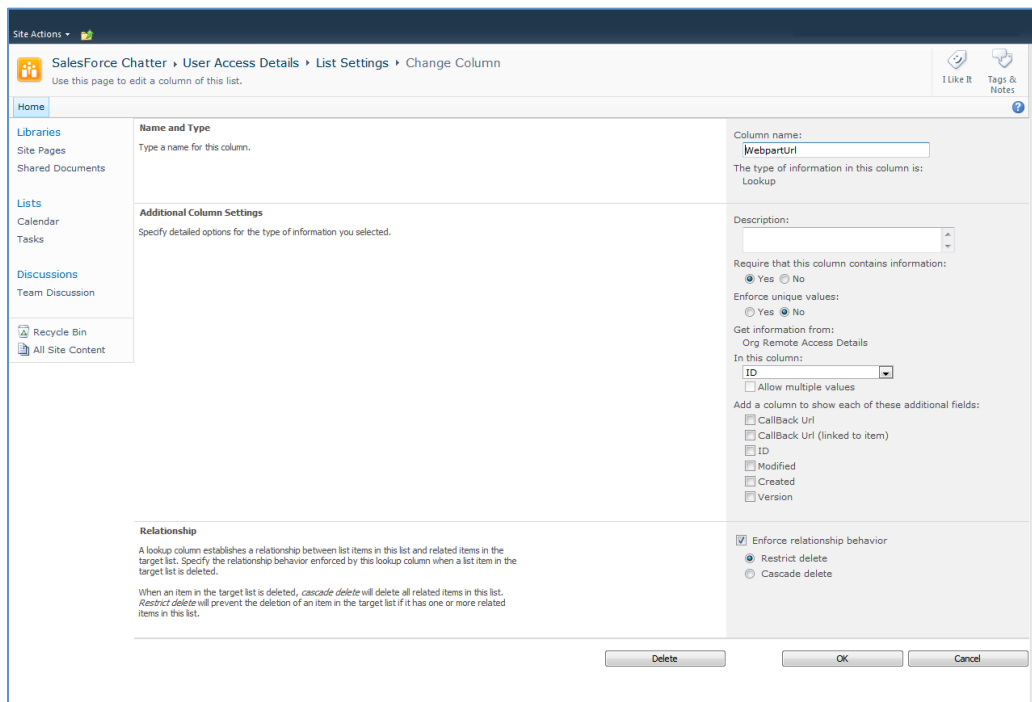


Figure 50: WebPartUrl - Change Column Page

- Click **Delete**.

A confirmation box appears.

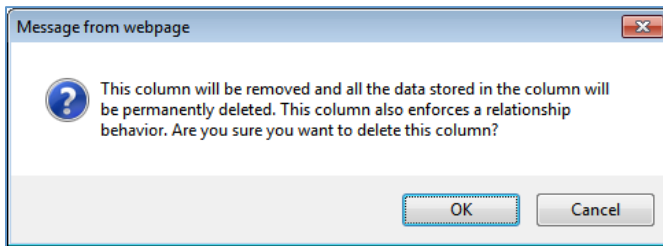


Figure 51: Delete Column Confirmation Box

6. Click **OK**. **List Settings** page appears.
The **WebPartUrl** column is deleted from the list.
7. On the List Settings page under **Permissions and Management**, click **Delete this list**.
A confirmation box appears.

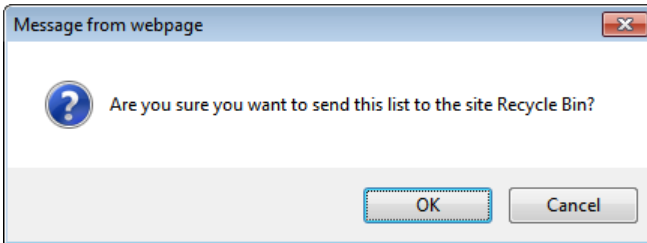


Figure 52: Delete User Access Details List Confirmation Box

8. Click **OK**.
The **User Access Details** list is deleted.
9. Access the **Org Remote Access Details** list using the following URL structure.
<http://<SiteUrl>/lists/Org Remote Access Details>
Replace the <SiteUrl> with base URL of the site from which the list needs to be deleted.
10. In the **List** tab on ribbon, click **List Settings** button.
List Settings page appears.

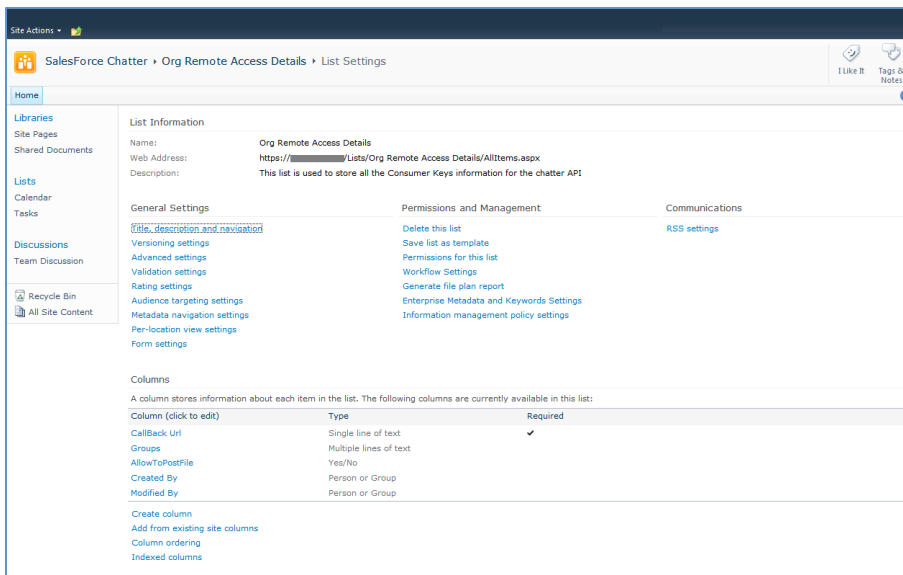


Figure 53: Org Remote Access Details - List Settings Page

11. On the List Settings page under **Permissions and Management**, click **Delete this list**.
A confirmation box appears.

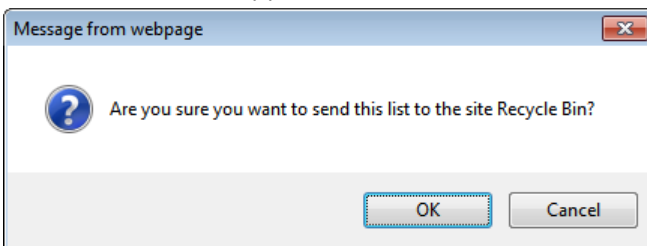


Figure 54: Delete Org Remote Access Details List Confirmation Box

12. Click **OK**.
The **Org Remote Access Details** list is deleted.
The lists used by the Chatter Connector are deleted.

5.3 Deactivate Features

To deactivate the Chatter Connector Features:

1. Log on to the Site Collection on which the Web Part needs to be added.
2. In the **Site Actions** list, click **Site Settings**.
The **Site Settings** page appears.
3. In the **Site Actions** area, click **Manage site features**.
The **Features** page appears.
4. Click **Deactivate** for the **SalesForce Chatter List Creation** feature.

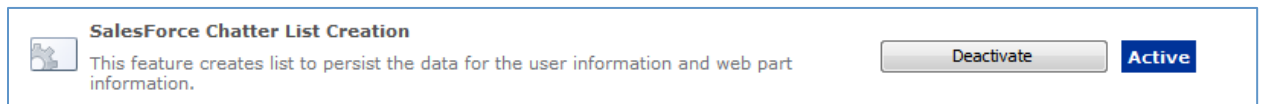


Figure 55: Salesforce Chatter List Creation

5. A **Warning** page appears, click **Deactivate this feature**.
The **SalesForce Chatter List Creation** feature is deactivated.
6. In the **Site Actions** list, click **Site Settings**.
The **Site Settings** page appears.
7. In the **Site Collection Administration** area, click **Site Collection Features**.
The **Features** page appears.
8. Click **Deactivate** for the **SalesForce Chatter Team Site Web Part** feature.

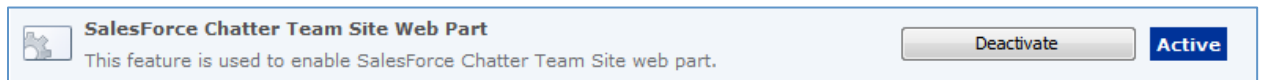


Figure 56: Salesforce Chatter Team Site Web Part Feature

9. A **Warning** page appears, click **Deactivate this feature**.
The **SalesForce Chatter Team Site Web Part** feature is activated.
10. Click **Activate** for the **SalesForce Chatter My Site Web Part** feature.



Figure 57: Salesforce Chatter My Site Web Part Feature

11. A **Warning** page appears, click **Deactivate this feature**.
The **SalesForce Chatter My Site Web Part** feature is activated.