APPENDIX B

OS/Browser/ Office Compatibility

Windows SharePoint Services 3.0 and Office SharePoint Server 2007 share similar technology requirements. This appendix provides an overview of how SharePoint runs in conjunction with various operating systems, browsers, and Office versions.

Server

Both WSS 3.0 and MOSS 2007 must be installed on Windows Server 2003. SharePoint cannot be installed on other operating systems.

Client

While users can access SharePoint sites from many operating systems, including Windows Vista, Windows XP, and Windows 2000, as well as Unix, Linux, and MacOS, there are some major differences in the user experience depending on the Internet browser being used and the version of Office (if any). These differences are described in the following sections. The latest version of Windows (Vista) with the latest version of Office (2007) and Internet Explorer (7.0) provides the best experience—no big surprise there.

WSS 3.0/MOSS 2007 Browser Compatibility

In general, Microsoft did a good job of making sure that most of the functionality in SharePoint 2007 works with a wide array of browsers across a variety of platforms. However, there are still places where Microsoft chose

to provide Internet Explorer with more functionality than non-IE browsers. This is somewhat unfortunate, given that many organizations have standardized on other browsers but would still like the full functionality of SharePoint.

In short, the functionality can best be described in two tiers. Level 1 browsers have the optimal SharePoint experience, while Level 2 browsers have a basic experience.

Level 1 Browsers

Level 1 Web browsers (Internet Explorer 6 or 7) need to be used by central administrators and users who need ActiveX-specific functionality and users who need access to the "rich text" fields. SharePoint 2007 provides a rich text editor with a text toolbar that takes advantage of some IE-specific functionality. Unfortunately, the rich text toolbar isn't cross-browser compatible. Users with Level 2 browsers can type in HTML tags in the rich text fields to achieve the same rich text effects.

The Level 1 Web browsers are IE 6.x and IE 7.0 for Windows.

Level 2 Browsers

Level 2 Web browsers support all of SharePoint's basic functionality so that users can both read and write in content sites, perform site administration, and perform other standard actions. Some functionality may not be available, some functionality may be available in a more limited form, and some visual rendering might not be as optimized as in Level 1 browsers. Level 2 Web browsers are not supported on the Central Administration site.

The Level 2 Web browsers are as follows:

Windows

Firefox 1.5+
Netscape 8.1+
Mozilla 1.7+

Macintosh

Safari 2.0+
Firefox 1.5+

Unix/Linux

Firefox 1.5+

Netscape 7.2+

The following Web browsers, which were supported in previous versions of SharePoint products and technologies, are not supported in the 3.0/2007 version:

Internet Explorer 5.01

Internet Explorer 5.5x

Internet Explorer for Macintosh

Office Version Compatibility

Microsoft Office's suite of desktop-based tools is used for content generation and modification and is the natural complement to the processes built into MOSS 2007. One of the challenges users might face is the differences in feature capabilities based on the version of Microsoft Office they are using.

One of the more powerful benefits of implementing a MOSS 2007 portal is its tight integration with the Microsoft Office products. Users can check out documents from document libraries, interact with online peers, and create document workspaces, all from within their desktop tools. SharePoint Portal Server 2003 and Office 2003 introduced this integration and provided a compelling reason for organizations to begin moving content off file and email servers and into more structured systems. Interestingly, several of those same organizations will upgrade their SharePoint portals to MOSS 2007 before updating all desktops with the latest version of Microsoft Office.

While Microsoft Office 2003 provides a solid user experience with MOSS 2007, several key features are limited or eliminated by not using the latest version of the Office products. The next section provides a detailed comparison of functionality differences between using Office 2003 and Office 2007 to interact with the same MOSS 2007 portal.

If you are currently using Office 2000, XP, or 2003 against SharePoint 2003 and you upgrade WSS 2.0 to WSS 3.0 or Microsoft Office SharePoint

Server 2007, your experience from Office XP or 2003 won't change. Office 97 is not officially supported with SharePoint (although you can upload Office 97 documents). You'll have the same amount of integration with SharePoint—no more, no less (see the *Good, Better, Best* whitepaper for SharePoint 2003). If you upgrade the client applications from Office 2003 to 2007, you get additional end-user benefits when using SharePoint 2007.

Outlook (Email Client)

Outlook 2003 offered limited visibility into SharePoint-based calendars and no bidirectional synchronization. Outlook 2003 and MOSS 2007 offer a similar experience. Outlook 2003 users can see MOSS-based calendars as independent entities but cannot integrate this calendar view with an existing personal calendar.

Outlook 2007 and MOSS 2007 offer a much richer user experience. Outlook 2007 and SharePoint event lists can be automatically synchronized so that information is updated bidirectionally. Another important feature is the ability to copy the contents of SharePoint lists directly into Outlook folders for offline access. This allows users to work remotely while still having direct access to critical SharePoint data.

Outlook 2007-only Integration Points with WSS 3.0 and MOSS 2007

Two-way sync with discussions, contacts, calendars, and tasks.

Ability to approve tasks/workflows right from Outlook without having to open SharePoint or the Office content.

Ability to overlay SharePoint calendars with other calendars (people, resources, and so on) and fully edit the calendar in Outlook, including offline.

From SharePoint, people can now email a link directly to a document/file. When a user clicks the link, the document opens in read mode, and a button appears, telling the user he or she can edit it or check it out to make changes. This allows sending a link for both read and edit purposes.

Ability to send an HTML email version of a SharePoint calendar to anyone, including outside the organization.

Ability to send InfoPath electronic forms via Outlook as email. Results can be stored in SharePoint. Drop-downs can also be fed from SharePoint.

Ability to have tasks from OneNote, SharePoint, and Project Server consolidate inside of Outlook.

Records management for email messages (assuming Exchange 2007 is installed) and the ability to integrate those emails with SharePoint's record management capabilities.

RSS reader—all SharePoint content is available via RSS feeds; Outlook 2007 has an integrated RSS reader.

Word (Word Processing)

Word 2007 provides integration with WSS 3.0 and MOSS 2007 by providing integrated metadata, workflow, and content management "hooks" into SharePoint. Office 2003 users can open and save documents to/from SharePoint, but the "save an offline draft" feature does not work.

Word 2007-only Integration Points with WSS 3.0 and MOSS 2007

Enterprise Content Management

- Ability to complete metadata in the Information Property Panel
- Ability to create custom Information Property Panels with business logic using InfoPath
- In-client workflows (initiate, complete, and so on)
- Ability to see that a document requires workflow actions (approve, sign, and so on)
- Ability to see that a document is locked and requires check-out to be modified
- Ability to see relevant corporate policies right in Office
- Rich Document signature workflow process

Ability to author and publish Web content

When opening a Word 2007 document from SharePoint 2007…

- Ability to see all previous published and draft versions
- Ability to restore to any previous version
- Ability to perform a graphical comparison between any two versions

Ability to create a new blog posting or wiki in SharePoint right from Word

Barcodes and metadata labels when printing content

Excel (Spreadsheets)

Excel Services is new to MOSS 2007, so no comparable functionality existed with Office 2003. The use of Excel 2003 files within an Excel Services model is very limited. A user would need to save an .xls file to the new .xlsx format and manually place that file in a trusted file location. No control would be available over what portions of the workbook could be published or made visible to SharePoint users.

Excel Services functionality is fully integrated within Excel 2007. Entire workbooks, individual worksheets, or specific charts can be published directly from Excel 2007 into MOSS 2007 dashboards. Users can also take advantage of advanced graphical representations within Excel 2007, such as conditional formatting and more detailed charting, to add polish to published charts.

Excel 2007-only Integration Points with WSS 3.0 and MOSS 2007

Publish spreadsheets to Excel Services

- Web-based spreadsheet access
- Web services interface to the spreadsheets

Enterprise Content Management

- Ability to complete metadata in the Information Property Panel
- Ability to create custom Information Property Panels with business logic using InfoPath
- In-client workflows (initiate, complete, and so on)

Ability to see a document requires workflow actions (approve, sign, and so on)

Ability to see a document is locked and requires check-out to be modified

Ability to see relevant corporate policies right in Office

Rich Document signature workflow process

PowerPoint (Slides)

In 2003, users could publish presentations. In 2007, you can publish individual slides, wrap each one in metadata, and then use a SharePoint slide library to dynamically assemble a PowerPoint presentation that is always up-to-date.

PowerPoint 2007-only Integration Points with WSS 3.0 and MOSS 2007

PowerPoint slide libraries

Enterprise Content Management

Ability to complete metadata in the Information Property Panel

Ability to create custom Information Property Panels with business logic using InfoPath

In-client workflows (initiate, complete, and so on)

Ability to see that a document requires workflow actions (approve, sign, and so on)

Ability to see that a document is locked and requires check-out to be modified

Ability to see relevant corporate policies right in Office

Rich Document signature workflow process

Access (Personal Database and Reporting)

With Access 2003 and SharePoint Portal Server 2003, users could export SharePoint list data to an Access database and maintain a link between the two lists. This allowed for the bidirectional synchronization of list data. Access users, however, could export tables to SharePoint sites, but no link could be maintained. This same functionality holds for the Access 2003/MOSS 2007 experience. Users can continue to integrate Access table data with SharePoint lists, but the linkage works only one way.

With Access 2007 and MOSS 2007, users can transfer an entire database from Access to SharePoint. Access 2007 tables are linked to MOSS 2007 lists, and all Access 2007 forms are converted to MOSS 2007 browser forms. In this scenario, users can access and maintain the same data from their client-side Access tool or the browser-based SharePoint sites.

Access 2007-only Integration Points with WSS 3.0 and MOSS 2007

Ability to publish rich reports using formats such as PDF/XPS from SharePoint lists

Ability to centralize the data storage to SharePoint lists

Ability to take work offline (see Chapter 12, "Office 2007: Offline Options for MOSS 2007")

InfoPath (Forms)

InfoPath was introduced as part of the Office 2003 product suite. It offered end users the ability to create electronic forms and publish these forms to SharePoint-based form libraries. The biggest challenge with InfoPath adoption was the requirement that all users of the form had to have InfoPath on their desktops. This holds true for InfoPath 2003 forms in a MOSS 2007 portal. All users are required to have a licensed copy of InfoPath to fill out an electronic form.

InfoPath 2007 makes electronic form adoption easier by leveraging the Forms Server component of MOSS 2007. This allows InfoPath users to continue to create and publish electronic forms with the InfoPath client, but all users of the form simply need Web browsers to interact with it.

InfoPath 2007-only Integration Points with WSS 3.0 and MOSS 2007

Ability to publish forms to SharePoint Forms Services. This enables the InfoPath forms to be accessed from Internet Explorer, Firefox, Safari, Netscape, or mobile devices.

Ability to send InfoPath forms as emails to Outlook 2007 users. Results can be stored in SharePoint. Drop-downs can also be fed from SharePoint.

Groove and OneNote (Collaboration)

Groove 3.1 had support for WSS 2.0 and SPS 2003 workspaces but has dropped workspace support in Groove 2007. Groove 2007 synchronizes with only WSS 3.0 or MOSS 2007 document libraries and does not work with prior versions of SharePoint. OneNote 2007 adds a synchronization feature that enables users to create shared notebooks on a WSS 3.0 or MOSS 2007 site. OneNote 2003 does not have this feature, nor does this feature work with OneNote 2007 saved to a WSS 2.0 site.

Groove 2007-only Integration Point with WSS 3.0 and MOSS 2007

Ability to synchronize SharePoint document libraries to Groove workspaces for secure collaboration whether online or offline.

OneNote 2007-only Integration Point with WSS 3.0 and MOSS 2007

Ability to create shared notebooks hosted/saved on a SharePoint site.

The Office Client: Putting It All Together

Your best experience will be with the Office 2007 client. If you can take the time to deploy Office 2007, it's worth it. However, Office 2003 will work for about 75% of user scenarios. Table B.1 shows the key differences between Office 2003 and Office 2007 with respect to SharePoint functionality.

Table B.1 Summary of Office Versions and SharePoint 2007 Integration

Product/Technology	Office 2003	Office 2007
Access Databases	Linked tables only. No offline access.	Integration of entire databases. Tables and forms automatically converted.
Excel Services	Workbooks must be saved as .xlsx. No control over publishing components.	Excel 2007 can publish to SharePoint directly from workbook. Users can control what gets published.

(continues)

Table B.1 *(continued)*

Product/Technology	Office 2003	Office 2007
PowerPoint Slide Libraries	Slides must be manually copied. Can't see slide library from within PowerPoint.	Can access slide library from within PowerPoint. Can check for updates.
InfoPath Forms	Users are required to have InfoPath to fill out forms.	Users are not required to have InfoPath; all data entry can be done through the browser.
Outlook	Poor integration with SharePoint calendars. No synchronization for PIM data.	Users can create an aggregate view of SharePoint and personal calendar events. SharePoint data can be copied to Outlook folders for offline access.
Word Documents	No automatic check-in/out with WSS 3.0 or MOSS 2007.	Automatic check-in/out. Integrated properties. Integrated workflow.

Key Points

For Office 2003 users who have leveraged the native integration with the various Office products and SharePoint Portal Server 2003, not much changes with an upgrade to MOSS 2007. Features that exist today continue to be presented in a familiar way. An upgrade to Office 2007, however, offers a much richer user experience across the Office product line.

In short, the ease-of-use story gets a lot better with Office 2007. If you are upgrading to WSS 3.0 or MOSS 2007 from an earlier version of SharePoint, do your users a favor and upgrade their Office versions as well. While an Office upgrade is not required to implement a MOSS 2007 portal, several key features of this release are reduced or eliminated without the latest version of Office.