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Microsoft

team collaboration

Using **Microsoft® Office** for more effective teamwork

JOHN PIERCE

Microsoft®

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Using Microsoft® Office for More Effective Teamwork

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Contents

Introduction

THE EXPERIENCE OF working on a team can be deeply rewarding and deeply frustrating—and sometimes both at the same time. Team members can leave a meeting feeling good about themselves when they've solved a particularly difficult issue or seen the results of a new process that alleviated redundant work or reduced the number of errors. On the other hand, the imperative of getting work done on schedule can lead to miscommunications and misunderstandings, undocumented shortcuts, abbreviated reviews, or just sloppy preparation—experiences that can damage a team's spirit and its reputation. In these cases, team members need to have a system in place that allows them to do more than promise to avoid similar mistakes in the future.

On its own, Microsoft Office can't ensure that a team works together effectively. Team dynamics, leadership, clarity of goals, and other mostly intangible factors play a large role in that. But having a tool such as Office at the center of how a team produces its work does provide support for important needs, including access to information, ease of communication, and content management (such as document versions, reviews, workflows, and approved publishing).

In *Team Collaboration: Using Microsoft Office for More Effective Teamwork*, you'll learn about these and other capabilities in Office—and also receive some advice about the nature and goals of teamwork.

The nature of work in general has changed as the result of worker mobility, the use of mobile computing devices, cloud computing and services, and the predominance of teamwork of all sorts. To meet these needs, the programs in Office have steadily evolved to facilitate collaboration. As you'll see as you read this book, Office is no longer designed with the assumption that you'll use it all on your own—at least for very long. At times, of course, you'll be at your PC, typing a document, preparing a presentation, or crunching numbers. But in most cases, the results of these activities will soon be shared with your coworkers, not to mention with managers, partners, vendors, and others.

And sharing work is often just the beginning of effective collaboration. What I hope you gain from this book is an understanding of how the capabilities in Office let teams share work in context—to help gather opinions, set goals, manage time, and facilitate decisions.

Who this book is for

Team Collaboration: Using Microsoft Office for More Effective Teamwork is intended for individuals and groups who want to know how to use Office to facilitate the work they do as a team. In this context, "team" could mean a small business (say, 5 to 12 people), a department within a larger organization, a project team made up of individuals from several different departments, or a group of independent contractors working together on one or more projects.

I use the term "project" frequently in this book to refer to the work teams do together. In many cases, this might be a true project (an activity with a defined set of goals and with specific start and end dates), but I also intend "project" to refer to the ongoing work of a team—work that is structured by tasks and the creation, review, and approval of documents and information.

And, of course, this book is intended for teams that create content in Office as one of their principal activities. This covers a broad spectrum of job roles and industries, including (but not limited to) sales, marketing, legal work, insurance, publishing, retail, engineering, government and public policy, nonprofits, and education.

Assumptions

This book contains both descriptive information that highlights capabilities in Office and some step-by-step procedures that lead you through a series of commands to execute a particular task. I've written this book assuming that readers are familiar with the general Office user interface or are learning it by consulting another source. You should at a minimum understand the structure of the Office ribbon and how it is organized in tabs and groups of commands.

Advanced users of Office will likely already work with many of the features described in the book. This book also does not cover any Office administration tasks. It does not describe how to centrally administer a SharePoint site collection, for example, or how to configure Lync Server or Exchange Server. Readers who need this information should turn to Microsoft TechNet (*www.microsoft.com/technet*) or other books from Microsoft Press.

How this book is organized

This book is organized in two parts. Part 1, "Concepts and basic tools," includes the book's first four chapters. It provides background information about how people work as a team and describes steps teams can take in Office to set up the tools they use to manage their work over time.

- Chapter 1, "Collaboration basics," describes factors that influence team dynamics, how teams can avoid groupthink, the use of brainstorming techniques, and other aspects of working as a group. This chapter also introduces some of the collaboration capabilities in Office.
- Chapter 2, "Building a SharePoint team site," covers details of how a team site can facilitate collaborative work, including how to work with a document library, how to track and manage tasks, and how to conduct a team discussion in SharePoint. This chapter also covers how to set up a workflow to manage document approval as well as other capabilities in SharePoint.
- Chapter 3, "Managing access and preserving history," details why and how teams need to control access to at least some of the information and content that they produce. You'll learn about the digital rights service in Office, document passwords, and how you can inspect a document to detect information that is best not to share. Chapter 3 also returns to the discussion of SharePoint to cover how to implement versions and approved publishing on a team site.
- Chapter 4, "Building team templates," explains why templates are useful in coordinating the work a team does. It covers how to find and work with the templates that come with Office; describes elements and features that make up templates in Excel, PowerPoint, and Word; and offers examples of how to build templates from scratch.

Part 2, "Working day to day as a team," includes Chapters 5 through 11. The majority of these chapters examine how teams can use specific programs in Office to collaborate. They also describe how the programs work together—for example, how you can manage a SharePoint task list from Outlook (Chapter 5, "An integrated Outlook"), make a PowerPoint presentation in Microsoft Lync (Chapter 6, "Working together in Lync"), or link notes in a OneNote notebook to a document in Word (Chapter 7, "Keeping track of discussions and ideas"). Chapters 8 through 10, respectively, cover collaborative features in Word, Excel, and PowerPoint. In these chapters you'll learn about coauthoring, a feature that enables more than one person to work on a file at the same time, in addition to more conventional collaborative features such as comments, revision marks, and combining and comparing files.

Chapter 11, "Working with Office Web Apps on SkyDrive," provides an overview of the capabilities available on SkyDrive, Microsoft's cloud service that provides storage, versioning, e-mail (under most circumstances), a calendar, and a contact list. You'll also learn more about Office Web Apps, which are web-based versions of the desktop programs that let you work with documents in a web browser.

Reading this book in chapter order is not necessary, but the book is designed (especially in Part 1) to add layers to the descriptions of features and capabilities as chapters progress. Readers just starting out working on a team will benefit from reading and working through the examples in the chapters in Part 1 before moving on to the specific program features covered in Part 2.

Office versions and requirements

The screen shots and procedures in this book are based on the Office 2013 Preview available during the summer and early fall of 2012. Keep in mind that the appearance of Office and the steps you follow to complete a task might be different in the final version that is released.

Some of the programs discussed in this book require server systems to run. These include SharePoint and Lync. In addition, some of the features described for Outlook are tied to using Outlook on Exchange Server. You can find information about online hosting services for SharePoint and Lync on Microsoft's website. You can also find information about third-party hosting solutions on the web.

Acknowledgments

Thanks to Rosemary Caperton, Valerie Woolley, Megan Smith-Creed, and Jorge Diaz for their help organizing, editing, and producing this book. Thanks also to Charles Schwenk for his conversations over the years, especially regarding the nature of groups and organizations, and to Lucinda Rowley, who exemplifies a collaborative spirit. On the home front, gratitude to MC, Fox, and Holly.

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CHAPTER 3

Managing access and preserving history

IN THIS CHAPTER

COLLABORATIVE WORK IS often facilitated through approaches that don't enforce rigorous structures. Brainstorming sessions serve this purpose, of course, where some or all of a team's members gather to generate ideas about future work, exchange ideas about what processes can be improved, or outline solutions to particularly difficult problems that keep coming up. In Part 2 of this book, you'll learn how Microsoft Lync supports various types of informal (and formal) communication that let teams exchange ideas in these ways and how teams can use a Microsoft OneNote notebook as a kind of ad hoc repository for recording all types of content and ideas.

See Also For more details, see Chapter 6, "Working together in Lync," and Chapter 7, "Keeping track of discussions and ideas."

In this chapter, you'll learn more about procedures and controls that teams can put in place to manage content they produce. Procedures such as these ensure that the formal processes, decisions, and finalized content that are born from practices such as brainstorming are applied and retained. Although the idea of applying "controls" can sometimes sound exclusionary (even punitive), that isn't the intent. The types of restrictions and controls described in this chapter help protect sensitive and potentially valuable information, set up processes to ensure that team members work with content that's complete, and help teams track and classify the files they use. In addition, restricting access to files and allowing only some team members to view documents that are still in draft form helps team members with expertise in certain areas (legal, financial, sales, engineering, and others) work without concern that the information they are preparing will be mistakenly distributed or modified before final versions are reviewed and approved.

This chapter also builds on some of the concepts you learned about in Chapter 2, "Building a SharePoint team site." In the last two major sections of this chapter, I'll expand on how you can use a document library to keep track of and manage content. To start the chapter, I'll describe some of the basic ways in which you can control access to and protect Office documents. You saw in Chapter 2 how to use groups and permission levels to manage a team site in SharePoint. Those permissions go a long way toward managing which team members can work on documents and what they can do, but some of a team's work will inevitably take place on documents that don't take advantage of the structure of the team site. In these cases, you can use tools like passwords and rights management to control access to documents.

Protecting Office documents

When teams work with sensitive and confidential information, they can use rights management to manage access to files and e-mail messages and to control what users can do with a file.

Rights management restricts permissions to a file to prevent unauthorized access and distribution. For example, you can apply rights management to documents that you don't want everyone on your team to forward, copy, or print. Permissions you set up by using rights management are stored with the file, which means that the restrictions you apply are in effect whether the file is stored in a SharePoint document library, in an Outlook message store, or on a network drive, for example.

A simpler approach to protecting documents—but one without the degree of control offered by rights management—is to protect files with a password. In Microsoft Word, Excel, and PowerPoint, you can define a password that's required to open a file and a different password that's needed to modify it.

Specific applications also include capabilities for protecting the data and formatting in files. In Chapter 8, "Working on shared documents in Word," you'll learn the steps involved when you want to restrict the formatting and editing of a document. Later in this section, I'll describe similar steps you can take to protect workbooks and worksheets in Excel.

First, I'll describe the protections offered by rights management.

Using rights management

Rights management helps teams and organizations enforce policies that control the copying and distribution of confidential or proprietary information. Rights are assigned to content when it is published, and the content is distributed in an encrypted form that provides protection wherever the content resides. In other words, a document that's protected with rights management carries that protection whether it is opened from SharePoint, SkyDrive, a network share, or as an e-mail attachment.

> **NOTE** Rights management isn't a complete solution for protecting information. Rights management can't prevent the theft, accidental deletion, or corruption of data, and rights management is not the same as an antimalware program. People with keen intent to hand over restricted content can still type it in a new document or copy important information by hand.

Some of the restrictions you can impose by applying rights management are the following:

- Prevent an authorized recipient of restricted content from forwarding, copying, modifying, printing, faxing, or pasting the content
- Prevent restricted content from being copied by using the Print Screen key
- Define a file expiration date so that content in documents, workbooks, or presentations can no longer be viewed after the specified period of time

You can apply rights management by using a template or through user-defined rights. For the Office 2013 Preview, Microsoft provided templates such as the Company Confidential template and the Company Confidential Read Only template. With the Company Confidential template, users of the content are allowed all rights needed to work with and modify the content but are not permitted to copy and print the content. With the Company Confidential Read Only template, users can only read or view the content but are not permitted to modify the content from its original published form. If you need a higher degree of control, you can apply permissions manually by defining user-defined rights.

To apply rights management to a file you are working with in PowerPoint, Excel, or Word, you work on the Info page in Backstage view. Use the Protect Presentation, Protect Workbook, or Protect Document command, depending on which program you're working with. In a message item in Outlook, click Set Permissions on the Info page.

You can also enable rights management for a list or library on your SharePoint team site. You might take this step to protect the content in a document library that's set up to store the specifications for new products or other valuable intellectual property. When rights management is applied to a library, it applies to all the files in that library. For a list, rights management applies only to files that are attached to list items, not to the list items themselves.

When a team member downloads a file from a list or library protected with rights management, the file is encrypted so that only authorized people can view it. Additional restrictions can be applied to users who can view the file. For documents in lists and libraries (as for documents you apply rights management to directly), these restrictions include making a file read-only, disabling the copying of text, preventing people from saving a local copy, and preventing people from printing the file.

The restrictions that are applied to a file when it is downloaded are based on the individual user's permissions on the site that contains the file. For example, a site owner can generally work with a file to edit it, copy it, or modify how rights management is applied. A team member with Edit Items permission for a library can edit, save, and copy the file, but these users cannot print the file unless specifically granted that permission.

NOTE Before you apply rights management to a list or library it must be enabled by an administrator for your site. Additionally, a server administrator must install protectors on all front-end web servers for every file type that the people in your organization want to protect by using rights management.

To apply rights management to a list or library, you must have at least the Design permission level for that list or library. If you have that level of permission, follow these steps:

1. Open the list or library.
2. On the Library tab (or List tab for a list), click **Library Settings** (or **List Settings**).
3. Under Permissions and Management, click **Information Rights Management**.

NOTE If the Information Rights Management link does not appear, rights management might not be enabled for your site. Contact your server administrator to see if it is possible to enable rights management for your site.

4. On the Information Rights Management Settings page, select the **Restrict Permission To Documents In This Library On Download** option.

5. In the Create A Permission Policy Title box, type a descriptive name. For example, you might use the name Team Confidential for a policy that applies to a list or library that will contain documents that are confidential within your team.
6. In the Add A Permission Policy Description box, type a description that explains to team members who use this list or library how they should handle protected content. For example, use a description such as "Only discuss with members of the team."
7. To apply additional restrictions to the documents in this list or library, click **Show Options**. You can then select exceptions such as allowing some team members to print a document. You can also set an option that prevents team members from uploading documents that don't support rights management to the list or library.

Using a password

When you save a file in Word, Excel, or PowerPoint, you can assign a password that other users need to enter to open or modify the document. In all three programs, open the Tools menu in the Save As dialog box and then click General Options to open the dialog box where you define the passwords.

Some additional options are included for each program:

- In Excel, you can select an option to always create a backup of the workbook or an option to prompt users to open the file as read-only.
- In Word, you also have the Read-Only Recommended option. The Protect Document button opens the Restrict Formatting And Editing pane, which you'll learn about in detail in Chapter 8.
- In PowerPoint, the General Options dialog box includes the Privacy Options area. The option Remove Automatically Created Personal Information From This File On Save controls whether PowerPoint removes or retains information such as the presentation author and other properties. You'll learn more about document properties later in this chapter.

The Info page also provides an option for applying a password that encrypts the contents of the current file. To encrypt an Excel workbook with a password, follow these steps (the steps in Word and PowerPoint are similar):

1. Click **File, Info**.
2. On the Info page, click **Protect Workbook** and then click **Encrypt With Password**.
3. In the Encrypt Document dialog box, type the password you want to use and then click **OK**.

4. Reenter the password.

   Be sure to take note of the warning in the dialog box about lost passwords: you can't recover them. Be sure to record the password in a safe place so that you can provide it to other users or refer to it yourself in the event you forget the password.

5. Click **OK**, and then save the workbook.

TIP

Not all file formats are compatible with passwords. For example, Excel files stored in the .csv format do not accept a password.

PREPARING TO SHARE A FILE

The Inspect Workbook area on the Info page provides three commands on the Check For Issues menu. The Check For Accessibility and Check For Compatibility commands apply in specific situations—when you want to know which elements of a document, workbook, or presentation could pose issues for people with disabilities, and when you want to know whether any features in a file aren't supported in earlier versions of a program.

You should make regular use of the third command—Inspect Document—before you distribute files to customers or partners, for example, or share a file with colleagues who aren't regular members of your team. You'll see an example of how you use the Document Inspector in PowerPoint in Chapter 10, "Preparing a presentation as a group." Figure 3-1 shows the Document Inspector for Excel.

In general, you can use the Document Inspector to detect elements in a file that you might want to remove or revise before you share the file. As you can see, one category for Excel is Hidden Rows And Columns. Imagine that you enter worksheet formulas that calculate the markup on a set of products or services or formulas related to performance bonuses or new salary ranges. If you hide these cells to focus on the results of the formulas—which users of Excel often do—it's easy to overlook the fact that you hid them later, or someone else getting ready to post the file might not realize that the formulas are contained in a hidden column or row. Inspecting a document will indicate that the workbook has hidden rows or columns. If you don't want to share the formulas with other users, you can return to the worksheet and convert the calculated values to static values, for example, or you might decide to keep the rows or columns hidden and save the workbook as a PDF file. For more details about saving a workbook as a PDF file, see “Creating a PDF/XPS document” in Chapter 9, “Collaborating in Excel.”

FIGURE 3-1 The Document Inspector can find content and properties you don’t necessarily want to share.

Protecting workbooks and worksheets

In this section, I’ll cover some specific steps you can take to protect the data and structure of Excel workbooks and worksheets. Because teams use Excel to compile and analyze financial data, these procedures are often applicable. These protections serve several purposes: they can retain the structure of a workbook, for example, or restrict which operations some users can perform. You can also specify editable cell ranges and protect the rest of a worksheet so that it is read-only. The intent of applying these restrictions has as much to do with preserving the work that team members did to construct specific financial scenarios or complex formulas as it does with limiting what other team members can do.

To apply permissions and protection to a workbook or a specific worksheet, you can use a menu of commands on the Info page in Backstage view, as shown in Figure 3-2.

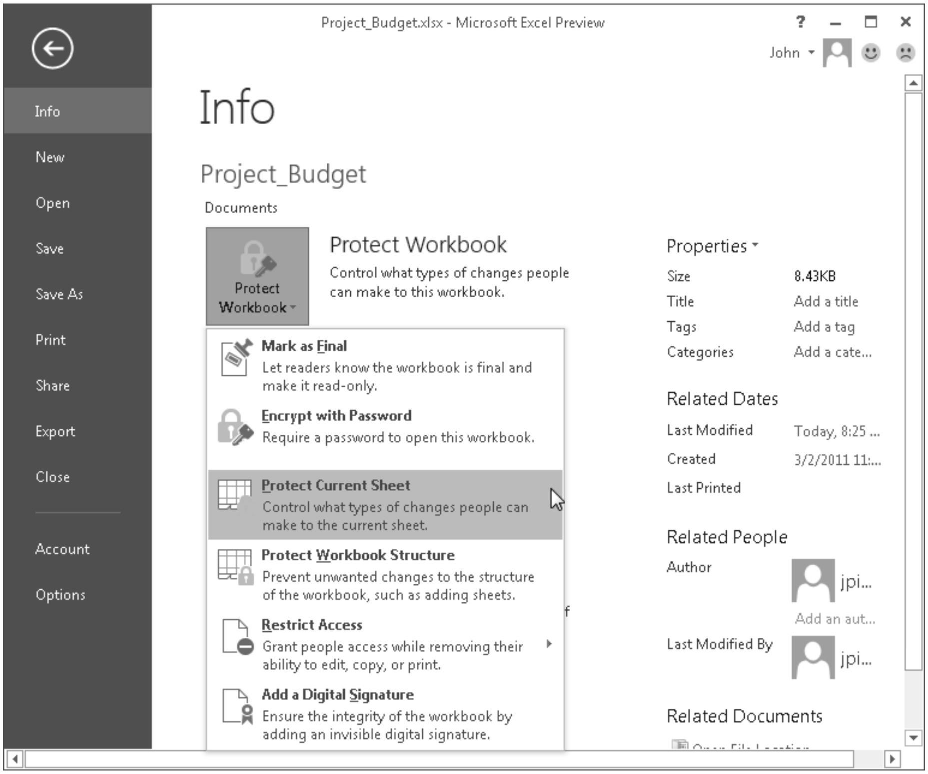
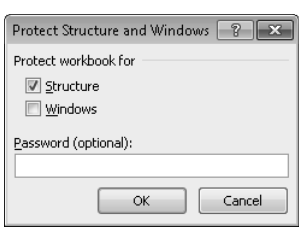


FIGURE 3-2 Select Protect Current Sheet or Protect Workbook Structure to manage how other users can interact with an Excel file.

To protect the structure of a workbook, follow these steps:

1. On the Info page, click **Protect Workbook**, and then click **Protect Workbook Structure**. (Or click Protect Workbook in the Changes group on the Review tab.)
2. In the Protect Structure And Windows dialog box, shown below, select the options you want and then enter an optional password.



When you protect a workbook's structure, users cannot insert, delete, or rename worksheets or display worksheets that are hidden. When you protect a workbook's window, users can't change the size or position of windows.

You can also restrict the operations users can perform on specific worksheets—for example, you might restrict what users can do to worksheets that contain summary formulas that are referenced in other worksheets designed for entering data.

To protect the current worksheet, follow these steps:

1. On the Info page in Backstage view, click **Protect Workbook**, and then click **Protect Current Sheet**. Or, on the Review tab, click **Protect Sheet** in the Changes group.

   You'll see the Protect Sheet dialog box, shown here:

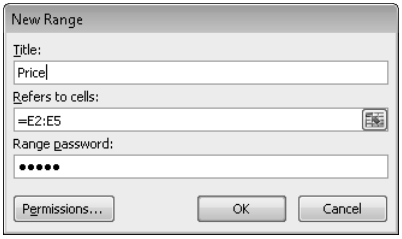
   You protect worksheets by selecting the specific operations users are allowed to perform. By keeping a check box clear, you prevent users from performing that task. The operations you can control include formatting cells, columns, and rows; inserting columns, rows, and hyperlinks; deleting columns and rows; sorting data; making use of automatic filters; using PivotTable reports; editing objects such as charts or illustrations; and editing scenarios, a feature related to the Excel Scenario Manager. The options Select Locked Cells and Select Unlocked Cells are selected by default.

2. Enter a password that allows you to remove sheet protection.

The next step in protecting a worksheet is to define cell ranges that specific users can edit after providing a password that you define. You can also grant specific users permission to edit ranges without a password.

Follow these steps to define editable cell ranges:

1. In the Changes group on the Review tab, click **Allow Users To Edit Ranges**.
2. In the Allow Users To Edit Ranges dialog box, click **New**.
3. In the New Range dialog box, shown in the following screen shot, enter a name for the cell range. (You can also accept the name Excel provides.) In the Refers To Cells box, enter the cell range you want to protect. You can also click in the Refers To Cells box and then drag through the range to define it.



4. In the Range Password box, type a password that a user must provide to edit data in this range.
5. To grant permission to specific users to edit a range without a password, click **Permissions**.
6. In the Permission dialog box, click **Add**.
7. In the Select Users Or Groups dialog box, type the names of the persons or group you want to give permission to, and then click **OK**.
8. In the Permission dialog box, keep the Allow option selected in the Permissions area.
9. Click **OK** to close the Permission dialog box, and then click **OK** in the New Range dialog box.
10. When prompted, type the password again to confirm it, and then click **OK** in the Allow Users To Edit Ranges dialog box.

You can open the Allow Users To Edit Ranges dialog box again to modify or delete a range, add another range, set permissions for other users, and to set or change options for how the worksheet is protected. Select the option Paste Permissions Information Into A New Workbook to keep a record of the permissions you granted to the editable ranges that were defined.

Managing versions

Teams often need to be very deliberate about the information they produce and distribute. In addition to controlling access to files and placing restrictions on sensitive content, teams can use features on their team site to maintain a history of their work and to manage when content is approved and made generally available.

See Also As you'll see in Chapter 4, "Building team templates," you can also use a template to help control the formatting and content of a document.

When you set up a document library, a slide library, or another type of library or list on your team site, you can select an option to track versions of the items the library or list will contain. Versioning settings let you manage how content is added to and edited in a list or library, and versioning also helps teams track the history of a document. For example, you can specify the number of versions you want to retain and choose to create and track both major and minor versions of a document. By maintaining this history, you can see how the team developed important documents and view previous versions if questions arise about why the final content ended up as it did.

For tight control, you can select an option that requires an authorized user (a user with at least Edit Item permission) to approve content that is submitted to a list or library and also specify a permission level at which users can view draft items. Users without the permissions you specify won't see draft items in the library until a team member with permissions publishes a draft. The set of versioning options also includes an option by which you can require that users check out a document before the document is edited.

IMPORTANT **Only team members who are site owners or have full control of the site can set up versioning. For more information about site permissions, see "Working with groups and permissions" in Chapter 2.**

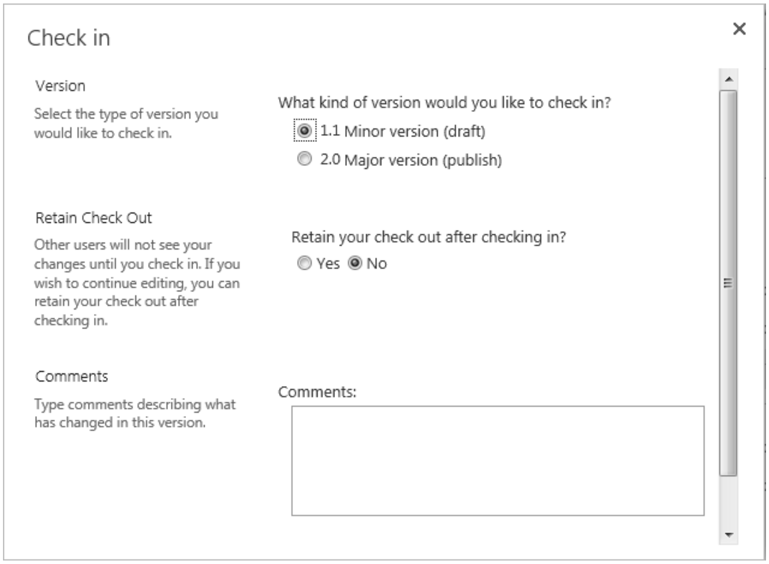
To set up versioning and specify versioning options for a document library, follow these steps:

1. Open the library, and click the Library tab on the ribbon.
2. In the Settings group, click **Library Settings**.
3. In the General Settings area of the Library Settings page, click **Versioning Settings**.
4. On the Versioning Settings page, set the following options:

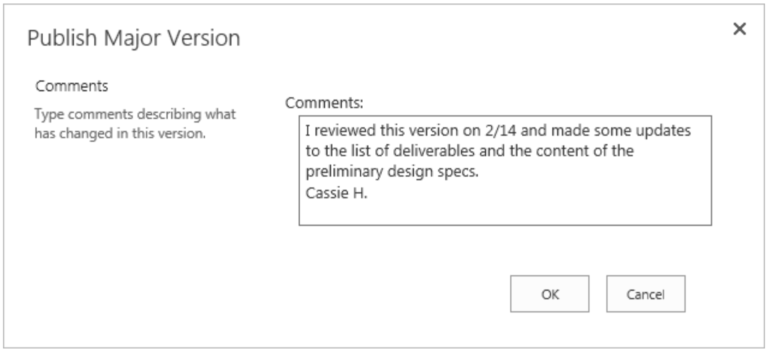
- In the Content Approval area, select Yes if you want items to be approved before they can be submitted to this library. (Items uploaded to the library are listed with a status of Draft until they are published and a status of Pending until an authorized user approves them.) If you select this option, you can then select options in the Draft Item Security area to specify who can view items that are pending approval in the library.)
- In the Document Version History area, specify how to manage versioning. You can choose not to use versioning, to create major versions, or to create major and minor versions. You can also indicate how many major versions and drafts of major versions to retain.
- If you select Yes under Content Approval, under Draft Item Security, you indicate who can see draft items. The default option is Only Users Who Can Approve Items. You can broaden the scope for who has access to draft items by choosing Any User Who Can Read Items or Only Users Who Can Edit Items.
- In the Require Check Out section, change the setting to Yes if you want to make it mandatory that users of the library check out a document before it can be edited.

When versioning and content approval are enabled for a library and you require that users check out and check in a document, the steps required to publish and approve a major version will go something like this:

1. A team member who is part of the team site's Members group uploads a document to the library. SharePoint recognizes that users are required to check in files and flags the file as checked out. Even authorized users will not see this item in the library until the user who uploads it checks it in.
2. When the team member checks in a file, SharePoint displays the Check In dialog box. As shown in the following screen shot, you can specify whether to check in a major or a minor version, keep the file checked out, and add a comment about the file and version. Checking in a minor version creates a draft item in the library. Checking in a major version sets the item's status to Pending (assuming that content approval is enabled). An authorized user needs to approve the item before it becomes accessible to all users of the library.



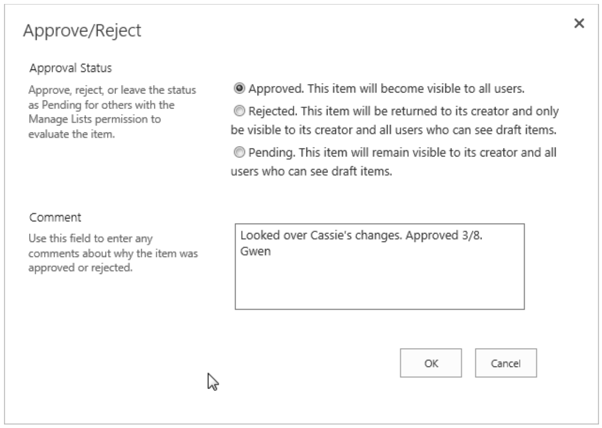
3. At this point, a draft item has been added to the library. To publish a draft item, a user with at least Edit Item permission (a site owner, a team member with full control, or a member of the Members group) selects the document and then clicks the Publish button on the Documents tab (in the Workflows group). In the Publish Major Version dialog box, shown here, add a comment about the version you are publishing before you click **OK**.



Because content approval is enabled for this library, publishing a draft document sets its status to Pending. A user with approval authority now needs to approve the document to change its status.

4. In the library, select the document that's pending approval.
5. In the Workflows group on the Documents tab, click **Approve/Reject**.

6. In the Approve/Reject dialog box, shown below, select the **Approved** option (or select Rejected, if necessary), add a comment about the action, and then click **OK**.



The Workflows group on the Documents tab provides the following additional commands:

- **Unpublish** Click this command to unpublish the current version, which returns an approved item to Draft status.
- **Cancel Approval** Click this command to cancel the submission of an item for approval. Cancel Approval returns a pending item to Draft status.

You can manage versions in the Version History dialog box, shown in Figure 3-3. To open the Version History dialog box, select the document you want to work with, and then click Version History in the Manage group.

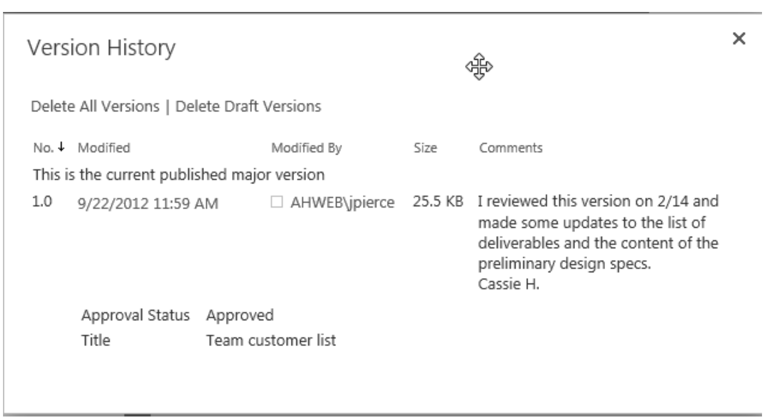


FIGURE 3-3 Select a version in the Version History dialog box to view it. You can also unpublish major versions if you have permission.

The Version History dialog box shows major versions of a document (and minor versions if you have permission to view draft items and you are tracking minor versions) and a version's status. In the Version History dialog box, point to a version you want to examine, and then click the arrow to open a menu you can use to view, restore, or unpublish the current version or to view, restore, or delete a previous version. If you retained draft versions of the document, use the link at the top of the dialog box to delete these versions. (They are moved to the site's Recycle Bin.) Use the Delete All Versions link to send previous versions of the document to the site's Recycle Bin.

Working with document properties

In the final section of this chapter, I'll describe how to work with document properties. Properties provide facts about a document. For example, when you create, fill in, and later edit a workbook in Excel, Excel sets and tracks properties such as the file's size, the dates on which the workbook was created and last modified, and the name of the workbook's author. Properties such as these are read-only. Other properties, including many advanced properties and custom properties you define, can be set in the program and updated by team members as needed.

Document properties aren't in themselves an aspect of collaboration. People who work all on their own might find properties a helpful device for categorizing and identifying content, and while teams gain the same organizational benefits from using properties, they can also use properties to require specific information—the due date for a proposal, for example, or the prospective revenue associated with a contract or service agreement, or who the lead attorney is on a pending case.

You can set some document properties when you work in Word or Excel, for example, and these programs (as well as PowerPoint) let you define custom properties. You can also set up a list or library on your team site to track properties in addition to those that the list or library contains by default. You do this by adding columns to a view or by defining a custom column, which you'll learn how to do in this section.

See Also For details about list and library views, see "Creating and modifying views" in Chapter 2.

Setting properties in an Office program

Many of the basic document properties are listed on the Info page in Backstage view. In PowerPoint, for example, the list shows the number of slides, the title, the date the presentation was created, and the date it was last modified. You'll see similar information for workbooks in Excel and for Word documents.

You can fill in or update some properties on the Info page. In PowerPoint, click Add A Category and then type a term you want to use—a project or customer name, for example. You can also specify properties such as an additional author. To see the full list of properties available on the Info page, click Show All Properties at the bottom of the list. In Excel, the list expands to display the properties shown in Figure 3-4. Several of the properties that are not filled in automatically, such as Title, Tags, Status, and Categories, have been filled in here.

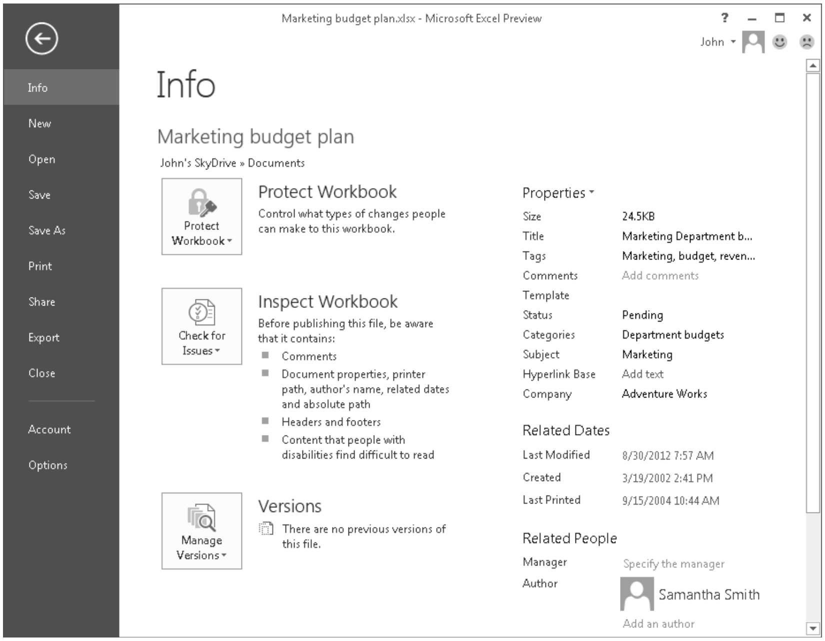


FIGURE 3-4 This screen shot shows the expanded list of properties on the Info page in Excel. You can add information for properties such as Tags and Title on this page.

To work with additional properties, click Properties at the top of the list, and then click Advanced Properties. You'll see the Properties dialog box. Figure 3-5 shows the Summary tab and the Custom tab.

The General and Statistics tabs display information about the file, including the creation and modification dates and when the file was printed. The Contents tab shows information such as the name of a document template, named ranges in a worksheet, or slide titles and themes. On the Summary tab, you can type values for properties such as Title and Subject. (Many of the properties listed on the Summary tab also appear in the list on the Info page.)

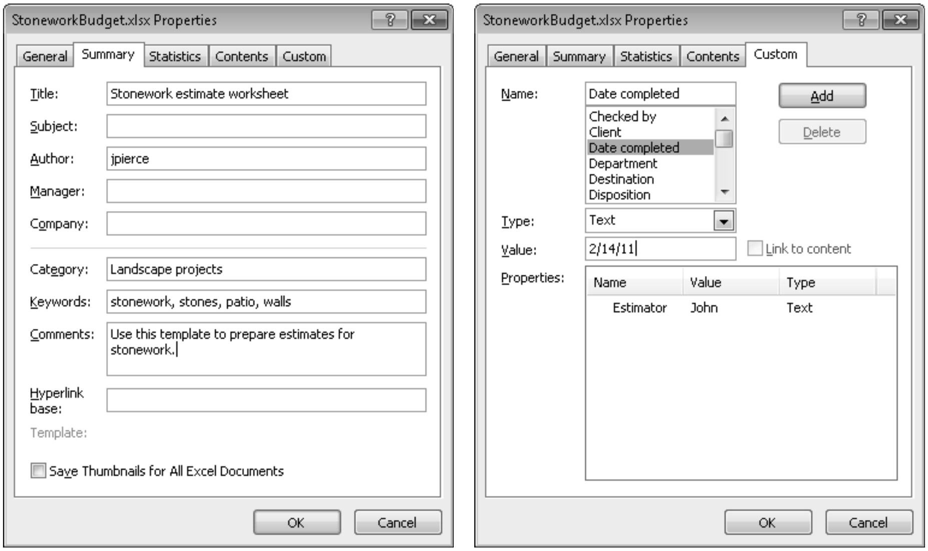


FIGURE 3-5 You can also view properties and document statistics in the Properties dialog box. Use the Custom tab to define properties of your own.

The Custom tab shows a list of properties designed for more specific purposes—Checked By, Client, Project, and Typist among them. These properties let you identify additional attributes about a workbook, document, or presentation. You can use the properties listed as a starting point for a custom property or define a custom property that reflects specific information your team wants to collect—a property that records who approved an estimate for a new project, for example.

To set the value for a property listed on the Custom tab, select the property in the list, type the value for the property, and then click Add. To define a custom property, follow these steps:

1. On the Custom tab, type the name of the property in the Name box.
2. From the Type list, select the data type for this property. You can choose from Text, Date, Number, and Yes/No.
3. In the Value box, type the value for the property.
4. Click **Add**.

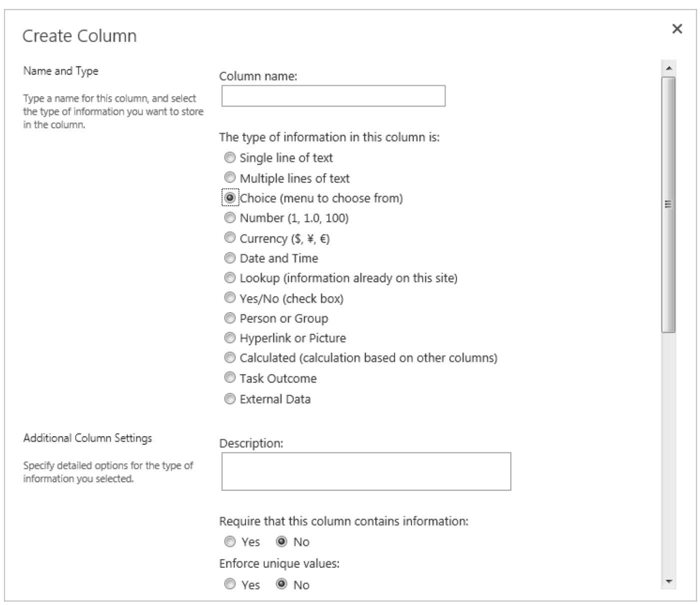
The name, value, or type of an advanced or custom property can be modified by selecting the property in the Properties list at the bottom of the Custom tab, and then updating the property by using the Name, Type, and Value boxes. Click Modify, and then click OK to complete the steps.

Defining properties for a list or library

To provide additional information about the items in a list or library on your team site, you can create your own column and add it to one or more views. Custom columns then serve as additional properties for the items stored in the list or library. By specifying that a column is required to contain a value, you can collect information about a document or a list item when it is added to your team site. For example, you might create a column named Due Date to use in a library where you store sales proposals. When a team member uploads a document, he or she has to fill in the due date, which helps you track when each proposal must be complete.

To create a column, a team member must be a team site owner or have Full Control permission. Follow these steps to define a column:

1. In the Manage Views group on the Library tab, click **Create Column**.
2. In the Create Column dialog box, shown below, type a name for the column and then select the column type.

   The options for the type of column include Single Line Of Text, Multiple Lines of Text, Number, Currency, Date And Time, Lookup (which you can tie to another field on your site), and others.

3. In the Additional Column Settings area, type a description for the column and then specify other settings as required for the column.

Options in the Additional Column Settings area of the dialog box change depending on the type of column. These options give you a high degree of control over the properties of a column you create. In the preceding screen shot, you can see some of the options for a Choice column. For the Number type, you use this area to specify the following:

- Whether the column is required (so that it must contain data)
- Whether the column must contain unique values
- A minimum and maximum value
- The number of decimal places
- A default value
- Whether to show the value as a percentage
- Whether to add this column to all content types in the library
- Whether to add this column to the default view

4. Set up a validation formula if necessary.

   In a Date And Time column, for example, you could create a formula so that only dates later than today are valid in the column.

5. Click **OK**.

> **TIP** Custom columns are added to the library's default view if you keep that option selected in the Create Column dialog box. They are not added automatically to other views defined for the library, but you can add them by modifying a view.

When a document is uploaded to a list or library with required columns, SharePoint displays a dialog box such as the one shown in Figure 3-6. Notice that, even though checkout and check-in are not required for this library, SharePoint uploads the document and checks it out to the person uploading the file. That person needs to fill in the required fields and then check in the document to make it accessible to other members using the team site.

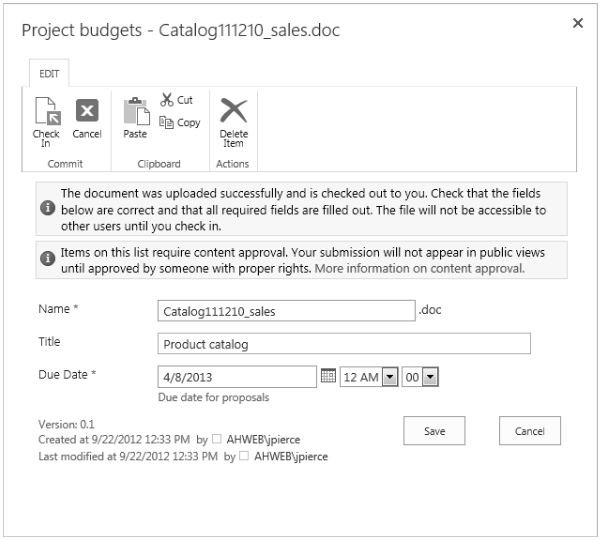


FIGURE 3-6 In a list or library with required columns, you can't add an item or check in a document until you fill in those properties. This screen shot also shows notifications you see for a library in which content approval is required.

For documents stored in the library—or for documents you create by using the New Document command in the library (or the New Item command for a list)—mandatory properties you define for a list or library are also accessible on the Document Panel in the related Office program. For a new document, the team member creating the document can fill in values for required properties before saving the file to the team site.

To view the Document Panel, first display the Info page in Backstage view. Click Properties at the top of the list of properties, and then click Show Document Panel. (If the Developer tab is displayed on the ribbon, you can also click Document Panel in the Templates group.) Figure 3-7 shows a blank Document Panel in a new Word document created from a document library. Filling in required properties at this point saves a step when the file is saved to the team site.

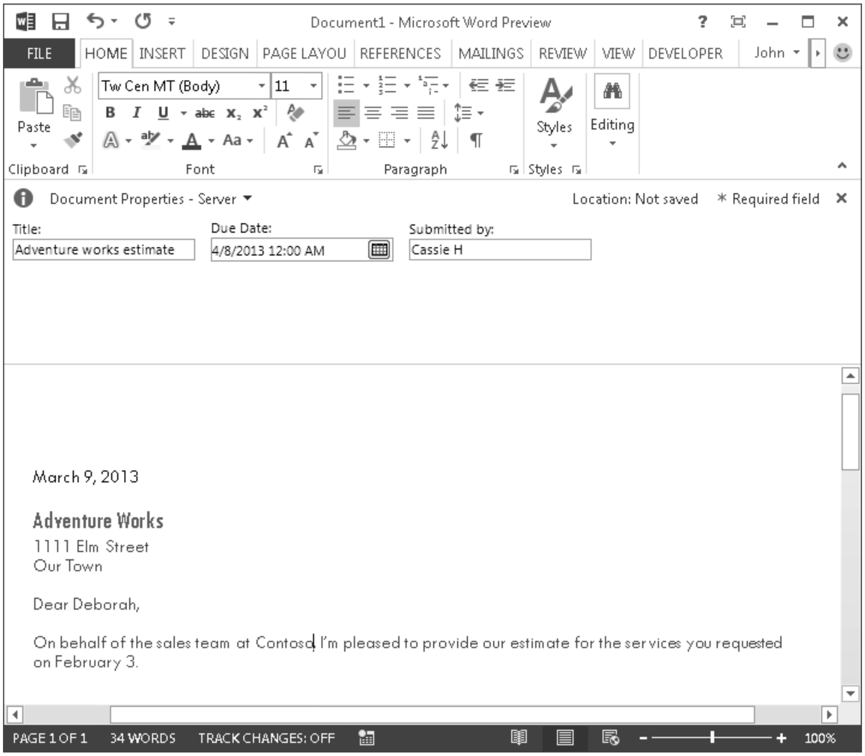


FIGURE 3-7 An asterisk indicates required fields in the document panel.

Another advantage of using properties is that SharePoint includes some properties in its search results. For example, SharePoint searches the text included in the Comments property in Word, Excel, or PowerPoint, and also searches the Title property. As you can with other columns in a list or library, you can sort and filter by a custom column to locate specific items of interest.

Index

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O

P