

About Document Collaboration

SharePoint Server 2007 sites help you to collaborate with others on the corporate network. The integration between SharePoint Server 2007 and the Microsoft Office® system brings together many powerful features for collaborating on documents. For example, using Microsoft Office® Word 2007, you can create a Document Workspace to collaborate with others on a document at a central location.

Topics in this guide:

- Create a Document Workspace
- Invite Others to Collaborate on a Document
- Collaborate on a Document
- Use Version Control
- Delete a Document Workspace


Create a Document Workspace

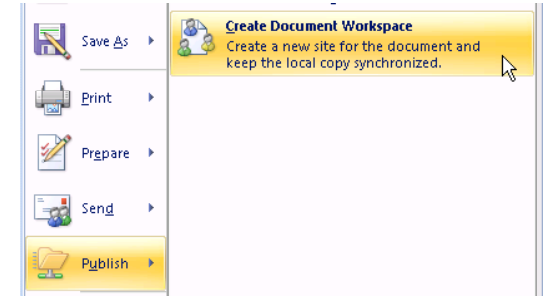
A Document Workspace is a document collaboration site created within an existing site. When you create a Document Workspace from within a Microsoft Office system application, the file is automatically uploaded to the workspace and is ready for collaboration.

- 1 Open a document you want to collaborate on.

Note Document Workspaces can be created within Word 2007, Microsoft® Office® Excel 2007, Microsoft® Office® PowerPoint 2007, and Microsoft® Office Visio® 2007 Visio.

- 2 Depending on the application you have open, do one of the following:

- In Microsoft Office Word, Excel, or PowerPoint, click the Microsoft Office  button, click **Publish**, and then click **Create Document Workspace**.



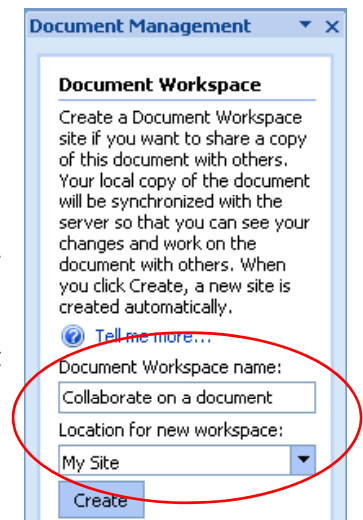
-OR-

- In Visio 2007, on the **Tools** menu, click **Document Management**.

- 3 In the **Document Management** pane, give your Document Workspace a name. **Note** The file name appears by default.

- 4 Choose a location for the new workspace. The location list shows you all the parent sites where your workspace may live. You can also type an address that goes directly to a SharePoint Server 2007 site, such as <http://sharepoint/sites/sitename>. **Tip** List the root name for the site without any suffixes.

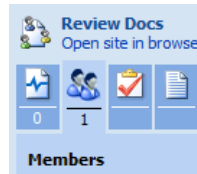
- 5 To create the workspace, click **Create**.



Invite Others to Collaborate on a Document

Now that you have a Workspace, you can invite others to collaborate.

- 1 Open the document. In the **Document Management** pane, click the **Members** tab. Near the bottom of the pane, click **Add new members**.



Note The **Document Management** pane should appear automatically when you open the document. If it does not:

- In Microsoft Office Word, Excel, or PowerPoint, click the Microsoft Office button, click **Server**, and then click **Document Management Information**.
- In Visio 2007, on the **Tools** menu, click **Document Management**.

- 2 In the **Add New Members** window, add e-mail addresses or user names of those you want to work on your file. Separate addresses or names with semicolons.

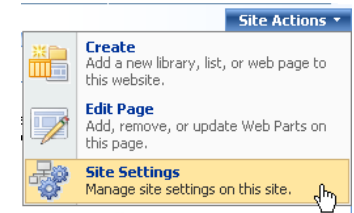
Note By default, your invitees are given Contributor permissions. This means they can edit and save documents in the workspace. SharePoint uses site groups to manage different permission levels for users. To assign different permissions, click a site group from the list.

- 3 Click **Next**, and then **Finish**.
- 4 In the **Add New Members** window, select the **Send an e-mail invitation to the new members** check box. You can see and edit the message before sending it..
- 5 Add any other information you would like to provide, and then click **Send**.

Add New Members From the Document Workspace


Note It is important to limit the availability of sensitive data posted on your site to only those you have given permission to access the data.

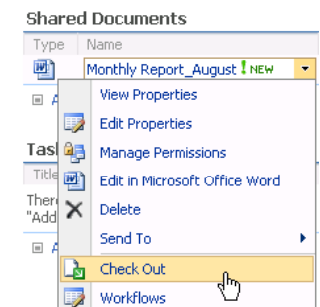
- 1 Open the document. In the **Document Management** pane, under the Document Workspace name, click **Open site in browser**.
- 2 In your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.
- 3 Under **Users and Permissions**, click **New**, and then click **Add Users**.




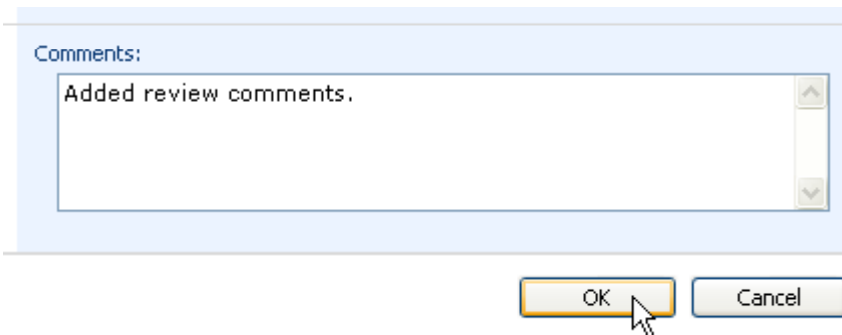
Collaborate on a Document

With your workspace created and your users given permission to the workspace, you can begin working on the document. Generally, a user goes to the workspace, checks out the document, edits it, and then checks it back in. This checkout procedure ensures that no one introduces changes to the document while someone else is working on it.


- 1 Go to the Document Workspace and move your pointer over the document you want to work on. When the arrow  appears, click it, and then click **Check Out**.
- 2 When a message appears asking whether to use the local drafts folder, click **OK**.



- 3 To work on the checked-out document, click  again, and then click **Edit in [application]**.
- 4 Make your changes, and then save and close the document.
- 5 In the **Check In** dialog box, click **Check in file**, and then click **OK**. (You can also click **Keep checked out**, which saves your changes to the document, but keeps the file checked out to you.)
- 6 Click the type of version you want to check in. For more information, see the next procedure.
- 7 Enter comments in the **Check In Comments** box, and then click **OK**.



Tips

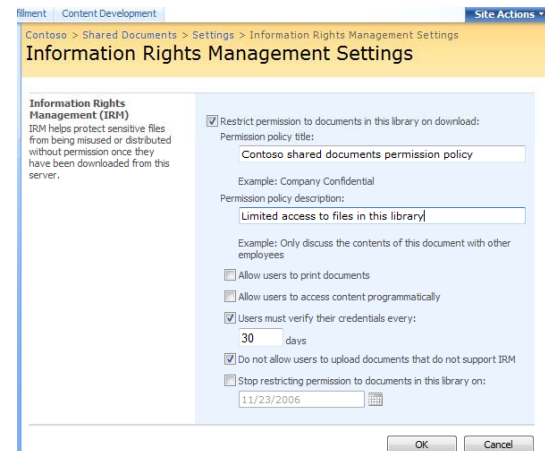
- To keep a record of all changes made to the document, activate version control. See "Use Version Control" later in this guide for more information.
- To receive a notice whenever a change is made to a document, click  next to the document, click **Alert Me**, fill out the form, and click **OK**.

Use Information Rights Management to Protect Lists and Libraries

Use Information Rights Management (IRM) to limit the actions users can take on files they download from your SharePoint Server 2007 lists or libraries. When you set IRM permissions on a list or library, all files in that list or library automatically inherit those permissions.

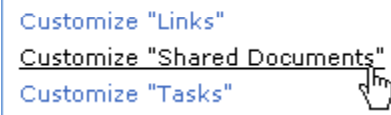


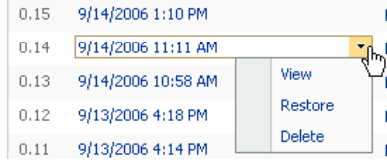
Note You must have at least the Design permission level to apply IRM.

- 1 On the list or library page, on the **Settings** menu, click **List Settings** or **Document Library Settings**.
- 2 Under **Permissions and Management**, click **Information Rights Management**.
- 3 On the **Information Rights Management Settings** page, select the **Restrict permission to documents in this library on download** check box. Select the options you want, and then click **OK**.



Use Version Control


You can save a version of your document each time it changes by using version control. Version control is useful for keeping a record of changes and for restoring a document to a previous version if necessary.

- 1 On your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.
- 2 Under **Site Administration**, click **Site libraries and lists**.
- 3 On the **Site Content** page, click **Customize "Shared Documents."**

- 4 On the **Customize Shared Documents** page, under **General Settings**, click **Versioning settings**.
- 5 On the **Document Library Versioning Settings: Shared Documents** page, under **Create a version each time you edit a file in this document library**, do the following:
 - To create major versions only, click **Create major versions**.
 - To create major and minor versions, click **Create major and minor (draft) versions**.
- 6 At the bottom of the page, click **OK**.
- 7 To see the versions of your document, click  next to the document, and then click **Version History**. To view, restore, or delete a version, click  next to the version, and then click the appropriate option.
 

Delete a Document Workspace

When your document collaboration is complete and you have saved your work elsewhere, delete your workspace. This frees space on the servers for other users.

- 1 On your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.
- 2 Under **Site Administration**, click **Delete this site**.
- 3 On the **Delete This Site** page, click **Delete**.

Note To delete individual documents in the workspace, click  next to the document name, and then click **Delete**.