



# seamless teamwork

- ▶ Using **Microsoft® SharePoint® Technologies** to Collaborate, Innovate, and Drive Business in New Ways

## MICHAEL SAMPSON



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*To my parents, Kingsley and Barbara Sampson, for their early formative influences,  
especially modeling the love of words and good books.*

—MICHAEL SAMPSON

# About the Author

**Michael Sampson** is a leading expert on improving the performance capability of virtual teams. He is an Industry Analyst and Independent Consultant, and speaks at conferences around the world. He is the President of The Michael Sampson Company in New Zealand.

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Michael holds a Master of Commerce with first class honors in telecommunications-based IT, from the University of Canterbury in New Zealand. He is currently working on his doctorate in collaborative applications and virtual teams.

Michael lives in New Zealand with his glorious wife, Katrina, and eight children: David, Matthew, Philip, Daniel, Timothy, Susanna, Jonathan, and Elizabeth. No, there were no multiple births, and at the time of writing this, their oldest child is 12. How's that for a busy household!

# Acknowledgments

**IT SEEMS ALMOST PASSÉ** to write that a book is a team effort, especially because there is only one name on the front cover of this one. I have read many previous book introductions, and the authors of those books are always calling out their thanks to a long list of people. For me, I have previously given mental assent to the idea that a book is a team effort, but having now written one and lived through the process as an author, I absolutely and unreservedly know it in my heart to be true. This book would not be in your hands if it were not for the diligent work and effort of many people.

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Marc Orchant played an early pivotal role in encouraging me to take my research on the effective use of SharePoint and make a book out of it. I was speaking with Marc about this book in late November 2007, and thanked him for the role he had played in getting it going. He issued me with a huge challenge for the book; he wanted to be able to say that he knew me when I was merely a “collaboration guru,” whereas after the book was out I would be the “worldwide expert in SharePoint.” That was typical Marc—huge vision, and a way of expanding the horizons of those who were his friends. Marc suffered a major heart attack four days later, and died a week after that. I didn’t get a chance to speak with him again, but in all of my writing, consulting, and teaching about SharePoint, I have tried to be true to his challenge to me. Thanks, Marc, but I still miss you.

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Peter Drucker, the great management sage, once wrote something to the effect that “There has to be more to your work than just writing books—they have to make an impact.” I hope this work lives up to his edict.

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# Introduction

## An Analyst Writing a Book on SharePoint?

**MY DAY JOB IS** running an industry analyst firm. Industry analysts look at what is happening with vendors and products at the level of the industry as a whole, instead of being worried about the messiness of individual situations. Analysts look for trends.

One of the trends I have been watching is the emergence of Microsoft SharePoint as a major force in multiple industries. The collaboration strategy of Microsoft in the late 1990s was centered on Microsoft Exchange Server, but with the dawn of a new millennium, Microsoft started to position SharePoint to take a far greater role. As the years have passed and the versions of SharePoint have ticked over, SharePoint has become increasingly central to the collaboration strategy of Microsoft, and indeed to many conversations about collaboration in organizations today.

The final frontier of the ascendancy of SharePoint is for it to take a central role in the work of individuals and teams in day-to-day organizational life. This book outlines a way to make that happen. The focal question is this: How can a team make the best use of SharePoint for team collaboration? Or saying that in a slightly different way, how can a team use all of the capabilities in SharePoint to work effectively with others they can't be with, to enhance team collaboration, and to drive business forward?

*Seamless Teamwork* is not written for my normal clients—the CIOs and IT decision makers in organizations. It is written for the business managers, team leaders, and end users in organizations who have been told by IT to use SharePoint. They haven't necessarily had a say in the matter, but for various business, regulatory, and technical reasons, change is in the air. Therefore, this book outlines a way of making the best of SharePoint for individuals and teams.

## Overview

This book is about a revolution in the way that people work together in business teams. For at least a decade, people have relied on Microsoft Office Outlook as the mainstay of their communication, collaboration, and coordination activities. E-mail messages are sent to team members to request information, to share a document or slide deck, and to start the brainstorming of a concept. Meetings are scheduled through the Outlook Calendar, with free and busy times flagged for ease of scheduling, and with calendar invites moving seamlessly between people by e-mail. Tasks are managed within Outlook, allowing people to create a sense of order in their lives.

But Outlook isn't enough, and in saying that, the criticism is leveled at e-mail in general. The wild success of e-mail—of which Outlook is a leading example—is a huge problem. Nearly everyone uses e-mail at work (90 percent), and nearly everyone uses e-mail every time they communicate with others using electronic tools (95 percent). This is trending downward, however, as some people switch to instant messaging for a portion of their business communication activities. And yet, e-mail is not suitable for many of the tasks we put it to. Our use of it for team collaboration creates more problems than it solves.

Consider, for example, the pain caused by the use of Outlook by business work teams in their activities:

- Judy attaches a draft document to an Outlook message and sends it for review to five people on the team. Five modified editions are sent back, leaving Judy the mess of getting a new edition prepared.
- Discussions by e-mail about a pending decision are all over the place as team members sometimes respond to everyone on the original list, or other times respond to just a couple. Team members also respond to different e-mail messages in the thread, which pushes the flow of thoughts out of kilter. Each person on the team has to sort out for themselves what was said to whom in response to what, if they can be bothered going to the hassle.
- Adam joins a team halfway into a project. Others on the team have to forward Adam any e-mail messages, documents, and task assignments that have piled up. What Adam receives depends on how well the other team members have retained their earlier joint activities.

- Each member on the team sorts and organizes the e-mail messages, documents, and other electronic team artifacts in his or her own nuanced ways. When seeking clarity over the third message in her list, Judy is almost guaranteed to fail if she asks Adam about the third message in his list. Each will have a different third message.
- E-mail messages are stored in Outlook folders, various editions of documents are stored with e-mail messages in some situations and in Windows Explorer folders in others, upcoming scheduled meetings are in Outlook Calendar folders, and current task assignments are stored in Outlook task folders, with no integration between them, and no way for Judy, Adam, or other people on the team to get a single consolidated view about what is going on within the project according to their set of records, let alone based on a shared set. Their project materials are stored all over the place, and each person has to keep his or her own mental view of what is going on.

It's actually a wonder that teams using e-mail get anything done!

## The Better Way

*Seamless Teamwork* explores a better way for work teams to communicate, collaborate, and coordinate their activities through SharePoint, a recent addition to the Microsoft product line. This use of SharePoint is instead of Outlook in certain situations and in addition to Outlook in others. Actually, it's in addition to a number of other products in the Microsoft product line—products such as OneNote, SharedView, Groove, Windows Live Messenger, and more.

*Seamless Teamwork* is organized around the idea of someone getting a new project to lead at their place of work, something that everyone reading this book should be able to relate to or aspire to.

Chapter 1, "The New Project," sets the stage for the rest of the book, introducing Roger and the project (Project Delta) that he has been asked to lead by using SharePoint. As you'll see, Roger represents an average project manager tasked with running a normal business project by using SharePoint, and the situations and decision points he faces will also look familiar. The chapter investigates the reasons for this use of SharePoint rather than continued reliance on e-mail, and it also addresses the issue of travel to accomplish teamwork.

Chapter 2, “Managing the Project and Finding a Team,” introduces “The Five Phases Project Life Cycle Model” that applies to many business projects, and which is used as the organizing framework for the approach in *Seamless Teamwork*. The chapter provides a high-level overview of what’s involved in each of the five phases, providing necessary context for the remainder of the book. Chapter 2 also looks at how a project leader can use the My Site capabilities of SharePoint to locate great people for team projects.

Chapter 3, “Setting Up SharePoint,” is aimed at the person charged with setting up the structures in SharePoint, for effective collaboration, and outlines a three-site approach to supporting team collaboration projects. Not everyone will have to do the work in this chapter, but for the person who does, it provides step-by-step instructions about the tools from SharePoint to use in each of the three sites. This approach is also designed with an eye to the longer term, for when the project is finished and for what happens then.

Chapter 4, “Team, Meet SharePoint,” is for the project team members themselves, and introduces them to the SharePoint site structure set up for their work in Chapter 3. It lays the foundation for effective teamwork by using SharePoint, and outlines how to keep team members involved in a project, even when they have many projects swirling around at any one time. The chapter also looks at the options for working with SharePoint team information when team members are not connected to the network.

The five chapters from Chapter 5, “Creating a Shared Vision,” to Chapter 9, “Concluding the Project,” each takes one of the five phases of the team project life cycle model and talks through the common events and activities in each phase, and addresses how and where SharePoint can be used to support these activities. For example, at some point, a document has to be written by the team that encapsulates their thinking and recommendations for moving the project forward. Chapter 7, “Analyzing the Options,” addresses this under the “Coauthoring a Document” topic, and describes different ways of doing so by using SharePoint.

To conclude *Seamless Teamwork*, Chapter 10, “Winning in the Market,” provides a brief snippet into what happened for Roger and Project Delta a year after the team finished their work. And it hints that, sometimes, working with others through SharePoint can lead to more than better business decisions!

Although Chapter 10 concludes the printed edition of *Seamless Teamwork*, there are two additional chapters available for readers. Chapter 11, “How to Use the Sponsors and Stakeholders Site,” takes the ideas of the Sponsors and Stakeholders site, as discussed and configured in Chapter 3, and talks

about how to use it. Chapter 12, “Beyond Seamless Teamwork,” addresses the wider governance issues of using SharePoint for collaboration within an enterprise context. Chapters 11 and 12 are only available online. See [www.seamlessteamwork.com](http://www.seamlessteamwork.com) for downloading instructions. Use the coupon code “IHAVETHEBOOK” to get both for no charge.

Finally, in a book of this nature, it is impossible to cover every eventuality, every situation, and every approach. What I hope you will get out of it is a vision of how you can apply the capabilities of SharePoint to the work of your team, rather than a prescription of what you need to do at each and every point of a teaming process. Embrace the ideas that work for you, and ignore the ones that don't.

## Who This Book Is For

This book is for everyone in an organization that uses SharePoint as part of their day-to-day collaborative work. I'm thinking of business managers, team members, information workers, and generally, anyone who has work to get done with others through the use of SharePoint.

*Seamless Teamwork* is not written for IT professionals looking to administer SharePoint or design applications for SharePoint—you need to buy a different book to deal with those issues. But it can still help IT professionals in ways that all of those other technical and geek-speak books cannot. It shows SharePoint within the world of the user rather than the hum of the data center.

For end users, a companion reference to *Seamless Teamwork* is *Microsoft Windows SharePoint Services 3.0 Step by Step*, by Olga Londer, Bill English, Todd Bleeker, and Penelope Coventry (Microsoft Press, 2007). Where *Seamless Teamwork* takes the team and its work as the organizing principle, and then looks at how to use SharePoint to facilitate that work, this *Step by Step* book approaches it from the opposite direction. There are benefits to both approaches, so these two books are highly complementary.

So, read this book, bring its principles and ideas to life in your projects with SharePoint, and learn how to get the best out of what has been made available from Microsoft, and in the process reach the business, professional, and personal goals that you embrace.

*Michael Sampson, michael@michaelsampson.net*  
*The Michael Sampson Company Limited*  
*September 2008*

# Foreword

**SINCE THE TURN OF THE MILLENNIUM**, online workspaces have become de rigueur for teams. Typically, a team comes together for its first meeting—whether face to face or by conference call—and proceeds to talk about how it will share documents, track progress, and keep up to date when they're no longer in one another's presence. For most teams, these conversations go no further than mentioning what technology they'll employ. "Use SharePoint," one team member might say. "Let's have weekly conference calls," says another, and off they go to do their work.

This is not best practice. Technology alone does not produce results for teams. They also need good sociology, which is why Jeff Stamps's and my motto has been, "90% people, 10% technology." Michael Sampson, the tireless analyst of collaboration, clearly adheres to this principle and provides SharePoint users with a must-read manual for teaming.

Rather than offering a simple how-to, which is the theme of most technology books, Michael has the insight and knowledge to show readers how to work—what they need to think about from a behavioral perspective to make "seamless teamwork" possible.

Michael practices what he espouses. He lives outside of Christchurch, New Zealand, not even in his small country's third-largest city. To connect to the larger global community of thinkers and practitioners concerned about virtual teams and collaboration, he must use the very best approaches to teamwork. I had the chance to visit his home office not long ago and saw the order he has created in the midst of the pandemonium of a house with eight home-schooled children. Mind maps, folksonomies for his knowledge management system, walls and walls of bookshelves, and several computer monitors facilitate his tracking trends in technology and teamwork. His widely read blog, "Working with People You Can't Be With," keeps up with both the technology and sociology of teamwork.

Put Michael's ideas into practice and you'll have a much more successful team.

*Jessica Lipnack, CEO, NetAge, and coauthor with Jeff Stamps of many books, including Virtual Teams, The Age of the Network, and Networking*



## CHAPTER 3

# Setting Up SharePoint

### IN THIS CHAPTER, YOU WILL

- Find out about the three general groups of people involved in any project.
- Create a SharePoint site to support the information requirements of everyone in the firm.
- Create a SharePoint site to enable the project sponsors to have a place to work on the project.
- Create a SharePoint site to facilitate the work of the core project team.

**WITH HIS TEAM** on board and raring to go, Roger was chugging down his fourth coffee for the day when he realized that it was time to stop using what other people had done in SharePoint and to start creating an effective working place for his team. He recalled seeing some announcement on one of the pages in SharePoint about how to set up a SharePoint site for effective team collaboration, and searching SharePoint, quickly found it again. “Geek speak,” he said to himself after reading the announcement, and picked up the phone to call Gareth Chan in California. “It’s 4:00 P.M. here in New York, so it’s 1:00 P.M. in California,” Roger muttered to himself. “I hope he’s not at lunch.”

“Hey, Roger,” said Gareth answering the phone. “It’s great to be working with you on Project Delta. How can I help you today?”

“Hi, Gareth,” Roger replied. “I have to set up an effective working place in SharePoint for my team, and although I’ve read the document on the SharePoint intranet, I’m still at a loss to know what to do. Can you give me any guidance, please?”

“Yes, absolutely!” said Gareth. “Sorry the document is hard to understand; I’ll take another look at it, but for the moment, we need to start by talking about the three groups of people involved in your project.”

“Three groups?” Roger was perplexed. “But it’s just me and the team.”

“I’m not surprised you’re perplexed, Roger,” replied Gareth, “but let me explain, and then let’s get you an effective working place in SharePoint before you head home today.”

## ■ The Three Constituencies in Any Project

For any project—Delta included—there are three broad constituencies of people who are interested in what happens:

- **The project team.** The people who are doing the actual work on the project on a day-to-day basis. They are charged with delivering an answer or an outcome to the performance objective of the project, and they have to work with each other to do so.
- **The project sponsors and stakeholders.** The people in the firm who have a stake in the outcome of the project—that is, they will be affected by the outcome in some way—and the people who are sponsoring the project within the firm. Although they also have a stake in the outcome, they have a greater stake in the process because they are the ones supporting it at a political level.
- **Everyone else.** All the other people in the firm who are not in the first two groups.

When SharePoint is set up for the project, all three constituencies need to be supported. However, the needs of each constituency are different, and if we just have one general place where all of the three constituencies work in together, it can lead to misunderstandings.

### A SharePoint Site for the Project Team

The team itself needs a secured place where they can do the work they have been asked to do, without constantly having to explain all of the nuances of what they are doing and to justify all of the decisions they are making. They need a place where draft documents can be thrashed out without having to feel worried that a key stakeholder is going to misinterpret the draft document as a final recommendation, and that they will be hauled into a meeting to explain themselves. Thus the team needs a separate place where they can work, without the constant interference of others.

### A SharePoint Site for the Sponsors and Stakeholders

The sponsors and stakeholders of the project need to be kept informed about what is going on in the project, and they also need a place where they can talk about the progress the team is making. These conversations should be private to the sponsors and stakeholders—they need to know that they can talk freely and think out loud without members of the project team misinterpreting what they are saying. At the same time, the sponsors and stakeholders don't need access to the place where the project team is actually working—because they lack the shared cognitive awareness that the team members have developed, they may misunderstand the work in progress and jump to invalid conclusions.

The site for the sponsors and stakeholders fills two purposes:

- Providing a place for the project team leader to communicate status and needs to the sponsors and stakeholders. The team leader has a way of managing what the sponsors and stakeholders hear, and can run interference for the work of the team.
- Providing a place for the sponsors and stakeholders to have their own meetings and discussions.

Both groups have a right to have a private place to work and discuss how things are going, without having the other group involved necessarily knowing everything that was said. That's absolutely no different to current organizational practices where the team can have a meeting without the sponsors and stakeholders actually being there, and vice versa. Each may know that the meeting happened, and that certain decisions were made, but the moment-by-moment account of what happened is left to those who were actually there. The same applies with SharePoint.

## A SharePoint Site for Everyone Else

The third constituency is everyone else. They aren't on the team, and neither are they a business stakeholder or sponsor of the project, but for some reason, they have an interest in what is being decided and recommended. Here are two examples:

- They have an overlapping interest in part of the project, but the overlap is not sufficient for them to be formally recognized as a stakeholder.
- The project finished two years ago, and a new person to the firm needs more information on what actually led to one of the decisions.

Regardless of their interest, "everyone else" has a right to know in broad terms what was decided or recommended, where to find more information, and in particular, who to go to for more information. Thus when someone visits the home page of the project, which should remain as a perpetual landing spot, they should find the following information:

- A summary statement or abstract of the work, along with an outline of the timeframe of the project and the key decisions that were reached
- Pointers to where more information can be found, such as documents and presentations in a SharePoint Document Library, or a section on the intranet
- A list of all the people who were involved
- The name of the key contact person for the project to whom any questions should be addressed

One more comment about “everyone else.” If you don’t create a landing page, all SharePoint does is say that a visitor to the site doesn’t have access, and gives the name of an IT administrator who may grant access. But apart from the name of the site, and the description of the site, there is nothing else to indicate what the project is actually about. And maybe it’s not appropriate for this person to have access to the inner workings of the team. Perhaps they just need to know a bit more about when the project was completed, and where to go for more information.

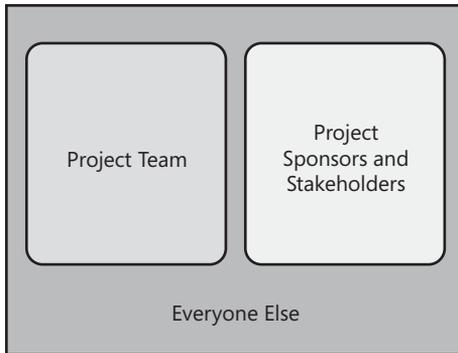
## Creating the Three Sites in SharePoint

When it comes time to creating the three sites in SharePoint, we take the idea of building design and access and apply it to SharePoint. In an office building—and even in a home for that matter—there is an accessible area for “everyone.” In an office, it’s the foyer. In a home, it’s the entrance way at the front door. In order to get past the foyer or the front door, you have to be granted access by someone—a security guard at the office, or one of the people in the home. After you pass the public area, you progressively enter into more secured areas. The most secured areas are generally in the middle of the building, or at the top of the building, thus creating physical distance between the entry place and the secured place.

We take the same approach in SharePoint. When anyone visits the project site, they come to the “foyer” of the project. Foyers in buildings have summary statements about the work that happens in the firm—say a mission statement on the wall, plaques of the awards the firm has won for its work, and copies of the latest annual report or firm newsletter. So when the project foyer is hit by a visitor, they see the same sorts of things.

If the visitor has the right level of access to get past the project foyer, they can go deeper into the site. If they are a member of the Project Sponsors and Stakeholders group, they can enter that area. If they belong to the Project Team, they can enter the area designated for the project team (see Figure 3-1).

SharePoint works on a hierarchical basis, so that sites contain subsites. This means that we create the “Everyone Else” site first, and then the other two sites inside it. Although the Everyone Else site has open access to anyone who can access the firm’s SharePoint implementation, the Project Team site and the Project Sponsors and Stakeholders site have controlled access.



**FIGURE 3-1** Every project is of interest to three broad constituencies, and SharePoint needs to support all three.

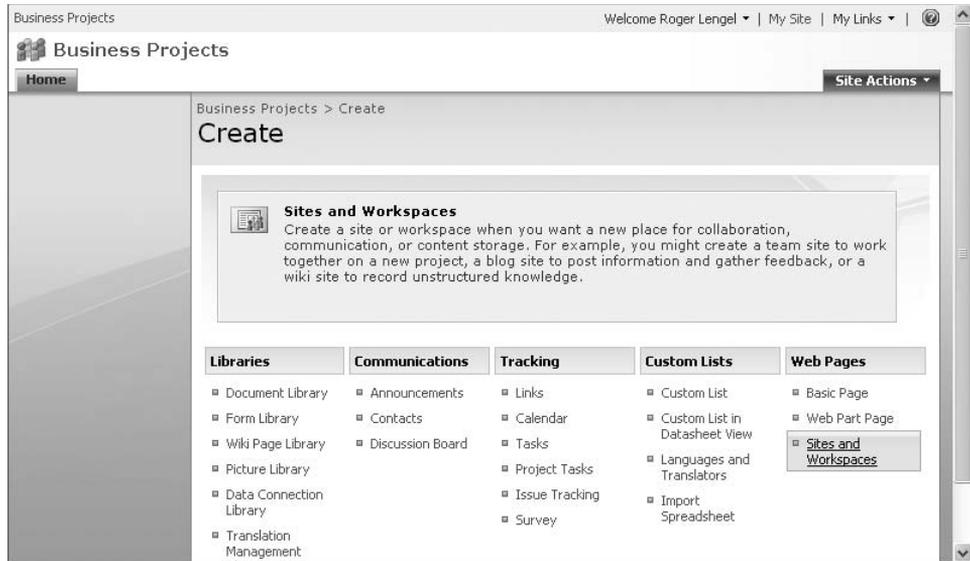
## ■ Create a SharePoint Site for Everyone Else

The Everyone Else site is very simple: it's just an Announcements list and a Links list that show on the first page that anyone hits when they visit the project site. It's possible to make it complex, but the Announcements list makes it nice and easy to express the summary information we want to show. And the Links list provides us with a way of giving people on the team or in the sponsors and stakeholders group with a quick way to get inside the appropriate site.

### Step 1. Create a Blank Site

SharePoint ships with numerous templates for sites, but none of those come with just an Announcements list and a Links list. So start by creating a blank site. You will need to first go into the place where business projects are created in your firm's SharePoint system, so that you create the site in the correct place. You will need certain rights in SharePoint to set up these sites, so if it appears that you can't do it, talk to your SharePoint contact in IT about how to proceed. In this book, we will be using the SharePoint system for Fourth Coffee as an example, and projects are created under the Business Projects area.

In the upper-right corner, click Site Actions, and then click Create. On the Create page that opens, click the Sites And Workspaces link under the Web Pages column to start (see Figure 3-2).



**FIGURE 3-2** Open the Create page to start a new blank site.

After clicking Sites And Workspaces, you are asked to fill out the key details about the project site you are creating:

- The title of the project site.
- A description for the project.
- The URL name for the project on the SharePoint system. This is what people will type in to the address bar of their browser when they want to visit the site.
- The template for the site. For this example, click Blank Site on the Collaboration tab (see Figure 3-3).
- The permissions for the site. These need to be unique, and not merely a copy of the parent Business Projects site.
- Various questions about navigation. Leave all these as Yes for this site (see Figure 3-4).

The screenshot shows the 'Title and Description' and 'Web Site Address' sections of the SharePoint site creation wizard. The 'Title and Description' section has a 'Title' field with 'Project Delta' and a 'Description' field with 'The home page for Project Delta, for access by everyone at Fourth Coffee.' The 'Web Site Address' section has a 'URL name' field with 'delta' and a preview of the URL: 'http://intranet.fourthcoffee.com/sites/projects/delta'. The 'Template Selection' section shows a list of templates: 'Team Site', 'Blank Site', 'Document Workspace', 'Wiki Site', and 'Blog'. The 'Blank Site' template is selected.

FIGURE 3-3 Give your new site a name and description, and use the Blank Site template.

The screenshot shows the 'Permissions' and 'Navigation' sections of the SharePoint site creation wizard. The 'Permissions' section has a 'User Permissions' section with two radio buttons: 'Use same permissions as parent site' (selected) and 'Use unique permissions'. The 'Navigation' section has three sections: 'Display this site on the Quick Launch of the parent site?' with 'Yes' selected, 'Display this site on the top link bar of the parent site?' with 'Yes' selected, and 'Use the top link bar from the parent site?' with 'Yes' selected. The 'Create' and 'Cancel' buttons are at the bottom right.

FIGURE 3-4 Set permissions and navigation options for the Everyone Else site.

When you are done, click Create. SharePoint takes a few moments to create the new blank site for you.

## Step 2. Set the Permissions for the Everyone Else Site

After the new site is created, SharePoint prompts you to configure the unique permissions for the site. There are three levels of access that can be set for a site (see Figure 3-5):

- Visitors, or people who can read what's happening within the site. Because this is the top-level site for Project Delta, we want everyone in the organization to be able to access the site and read what's happening. There should be an existing group in your SharePoint system for this. For Roger at Fourth Coffee, that's the All Fourth Coffee Employees group.
- Members, or people who can use the lists and libraries that have been made available in the site, but cannot change the design of the site. For this top-level site, this group can be left empty for the moment.
- Owners, or people who have access to both the content and the design of the site. For this top-level site, that's the project leader and the SharePoint contact person from IT.

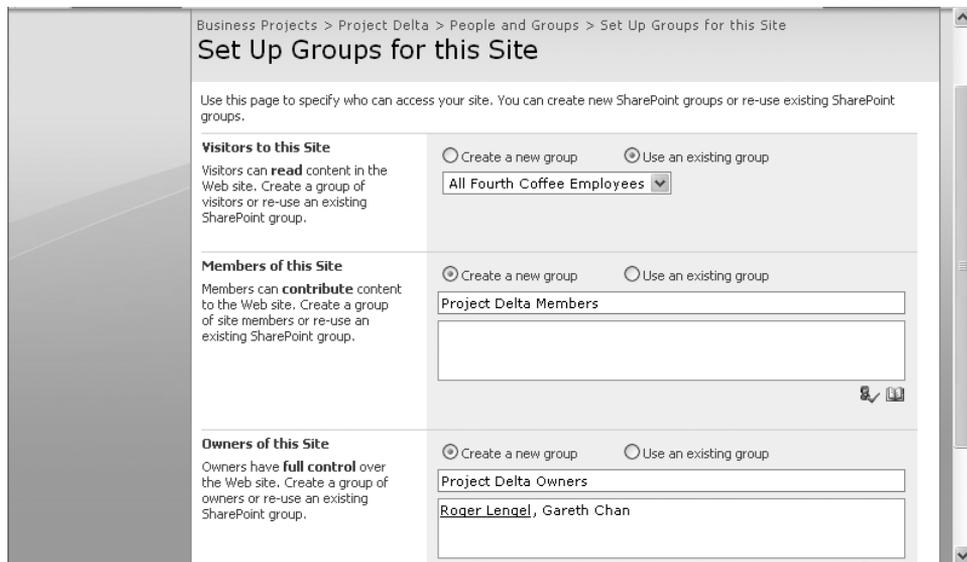
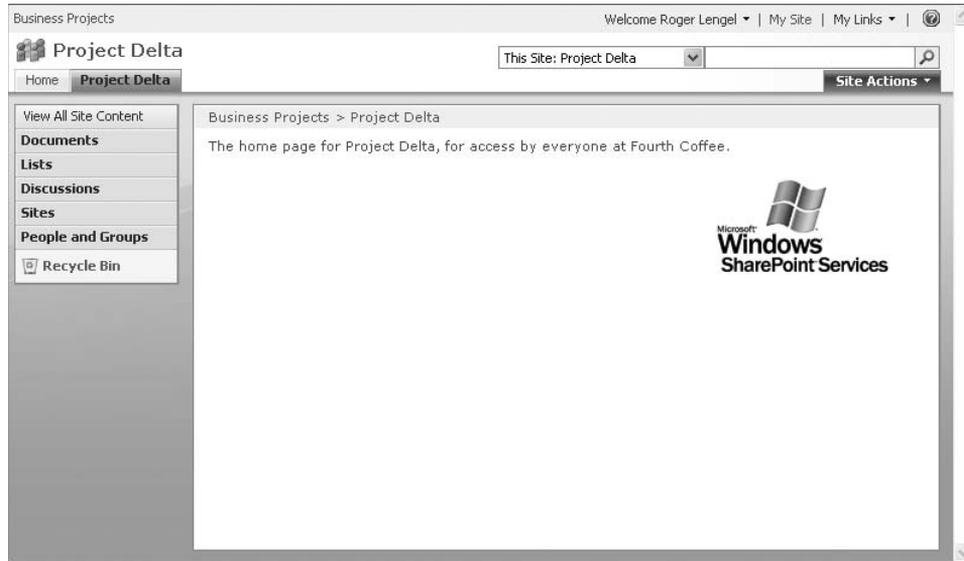


FIGURE 3-5 Set the permissions for the groups that have access to the Everyone Else site.

After you have selected the appropriate “All Employees” group and entered the names of the people who belong in the Owners group, click OK. You are now taken to the main page of the new blank site (see Figure 3-6).



**FIGURE 3-6** The blank Everyone Else team site

### Step 3. Create the Announcements List

The third step is to create the Announcements list to contain the information that will be made available to everyone. To do this, in the upper-right corner of the screen, click Site Actions, and then click Create. This opens the Create page, from where you can choose the Announcements list from the Communications column. There are lots of other choices, but for the moment, we will just create the Announcements list (see Figure 3-7).

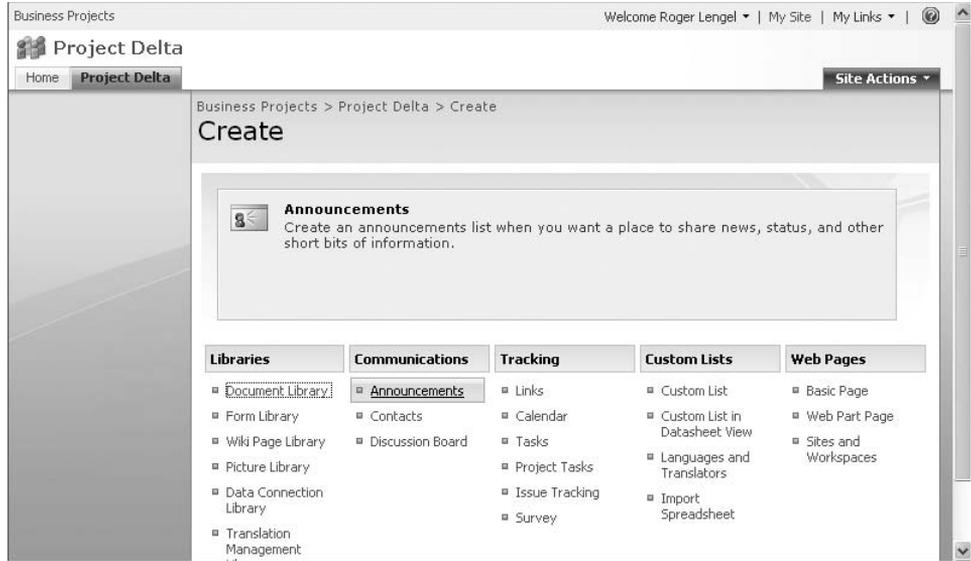


FIGURE 3-7 Add an Announcements list to the Everyone Else site.

As with creating the site itself, there are some fields that you have to complete (see Figure 3-8):

- Name of the Announcements list. This will show in future pages, so choose something that others can relate to at a glance. For this example, enter **Welcome to Project Delta**.
- A description for the Announcements list. This is really helpful if you have multiple Announcements lists in the same site, something we won't be doing in this one. But for the time being, write something interesting (and accurate!) about the role of the Announcements list.
- A navigation choice, about whether you want to show the new list in the Quick Launch area. We will turn off the Quick Launch bar in Step 9, so choose No.

When you have filled out the details, go ahead and click the Create button. You are then taken to the new Announcements list (see Figure 3-9).

The screenshot shows the 'New' form in a SharePoint site. The breadcrumb trail is 'Business Projects > Project Delta > Create > New'. The page title is 'New'. There are two main sections: 'Name and Description' and 'Navigation'. In the 'Name and Description' section, the 'Name' field contains 'Welcome to Project Delta' and the 'Description' field contains 'The announcement list for everyone in Fourth Coffee about Project Delta.'. In the 'Navigation' section, there is a checkbox 'Display this list on the Quick Launch?' which is checked. At the bottom right, there are 'Create' and 'Cancel' buttons.

FIGURE 3-8 Give the Announcements list a name and description.

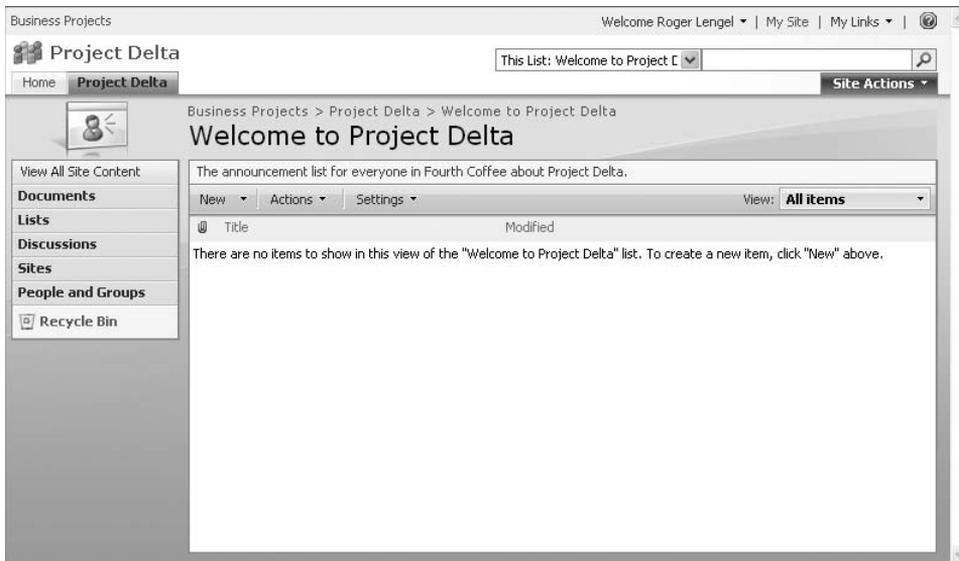
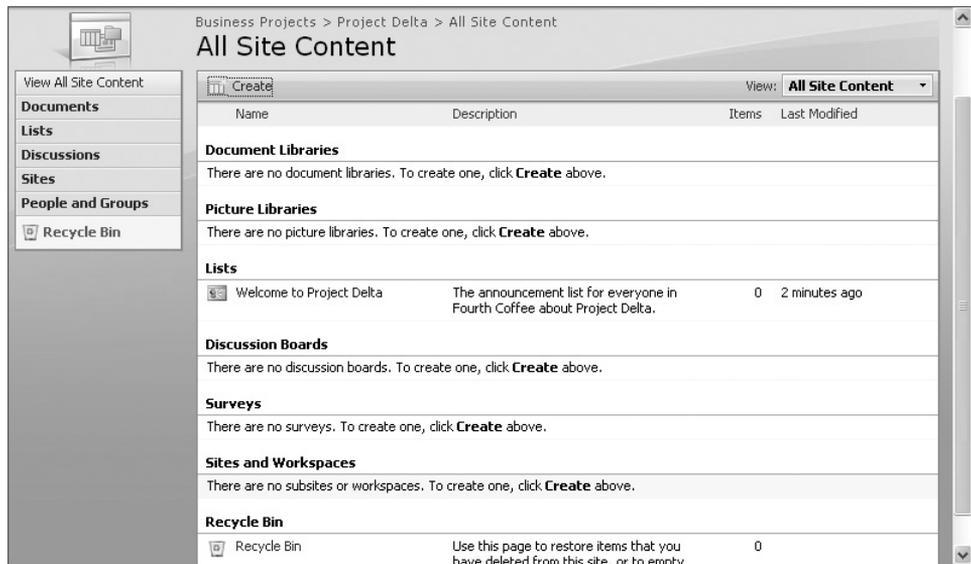


FIGURE 3-9 The blank Announcements list in the Everyone Else site

The other place to take a quick look is the All Site Content page, accessed by clicking the View All Site Content link on the left side of the page. This will show you all of the libraries, lists, discussion boards, sites and workspaces, and more in the current SharePoint site. Because this one only has an Announcements list that we have named *Welcome to Project Delta*, that and the description we entered are the only things that show (see Figure 3-10).



**FIGURE 3-10** You can view all of the lists and libraries for a given SharePoint site.

## Step 4. Link the Announcements List to the Main Page

Now that we have the Announcements list created, we want to set it so that it's the first thing that people see when they visit the home page for the site. To do this, we click back to the main page of the Everyone Else site, and then choose Site Actions and Edit Page from the upper-right corner. This allows us to modify what the main page looks like. The first thing we want to do is to add a Web Part to the main section of the page.

## WHAT'S A WEB PART?

Let's talk about language for a minute. We'll start by talking about a Web page, then a SharePoint site, and finally a Web Part.

A *Web page* shows information, images, links, and other things to people visiting a Web site through a Web browser. It's what you read or view when you are browsing the Web. When you visit a particular Web site, for example *www.microsoft.com*, what you see when first getting there is the home Web page.

A *SharePoint site* is a Web site for collaboration (although given the broad nature of SharePoint, it can be for other things, too). What's important to realize right now is that a given SharePoint site can contain multiple sub-elements—a document library, a shared list, a team calendar. When you visit the document library, for example, you see the library displayed as a Web page.

*Web Parts* enable you to visit a Web page in SharePoint and see multiple sub-elements of a SharePoint site on a single page. Think of it as the front of a multistory house, where each room behind the frontage is a different sub-element of a SharePoint site, and a Web Part is the window into each room. Each room will be decorated differently—a girl's bedroom is often different colors than a boy's bedroom for example, or at least has different posters on the wall—but by looking in the window, you get to see a little bit of what's inside each room. When you enter the room, on the other hand, you get to see everything in there. The same holds true for a Web Part—it's a mini-window into one of the sub-elements in a SharePoint site, viewable side by side with Web Parts for other sub-elements. They are really powerful because they provide an at-a-glance snapshot of many different parts of what makes up a SharePoint site.

To add a Web Part to the page, click Add A Web Part in the middle of the screen. This opens the Add Web Parts dialog box (see Figure 3-11). This dialog box shows us a list of any lists and libraries in the site, along with the total list of all Web Parts that are available for the current site. In this instance, we want to link the page with the Welcome To Project Delta list. Select Welcome To Project Delta, and then click Add.

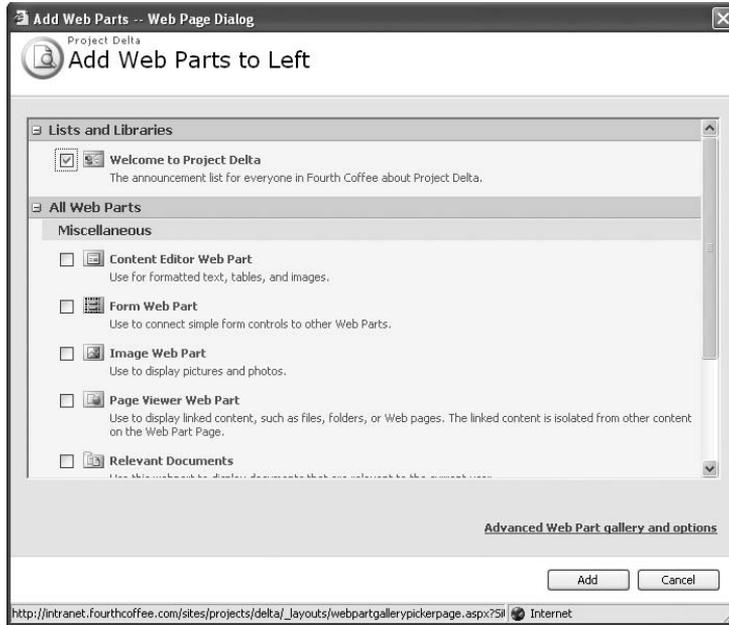


FIGURE 3-11 Add the Welcome To Project Delta Web Part to the page.

After SharePoint creates the Web Part, it displays the updated Web Part page (see Figure 3-12).

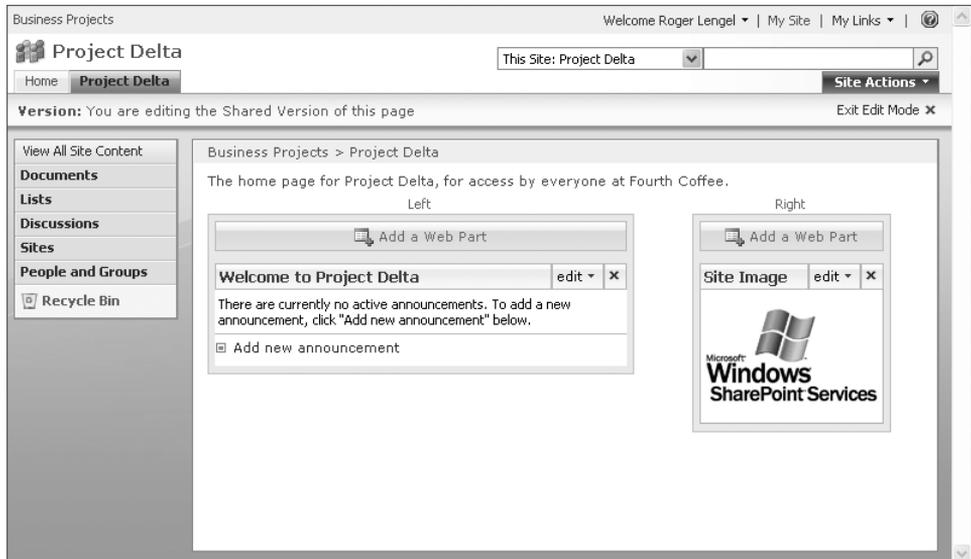
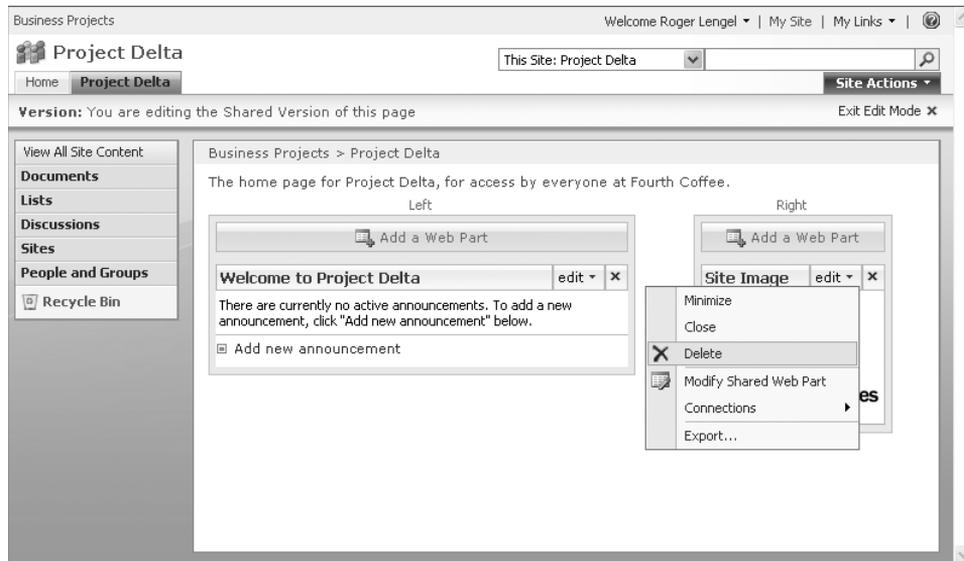


FIGURE 3-12 The updated Web Part page in Edit Mode

Before leaving this page, delete the Windows SharePoint Services logo Part on the right side. You don't need it for this project, so click the Edit arrow, and then click Delete (see Figure 3-13).



**FIGURE 3-13** Delete the Site Image Web Part.

After the screen refreshes, click Exit Edit Mode in the upper-right corner to save your changes.

You are returned to the main page of the new Project Delta site, with your new Announcements list (named *Welcome to Project Delta*) showing there. The new list does not have any announcements in it at the moment, so the page is blank. We'll change that next.

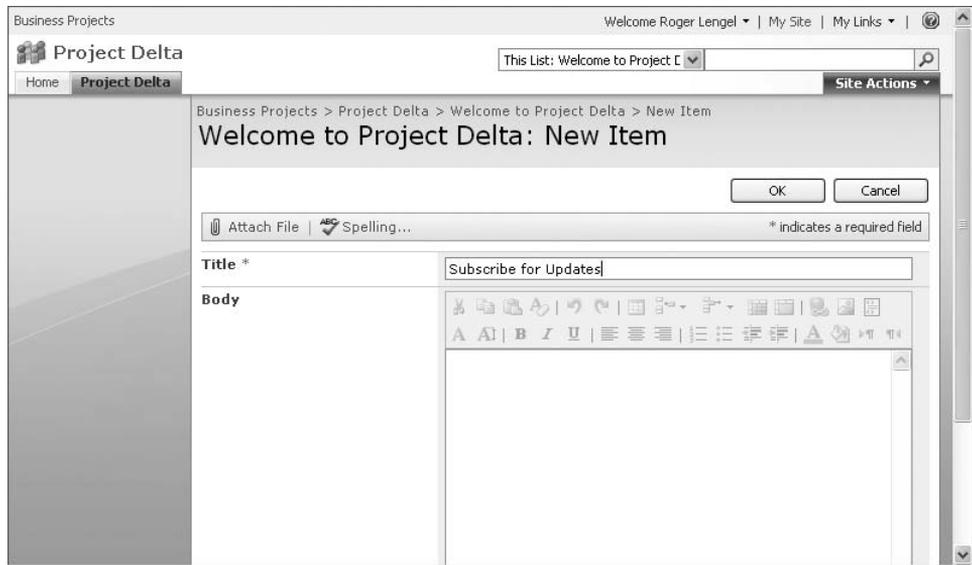
## Step 5. Ghost Write the Five Announcements

There are five main areas that we want to outline in this top-level site for everyone who visits:

- A brief summary of the project
- A brief statement about the objectives of the project
- A listing of the people who are involved in the project
- The name of the key contact person
- Advice to people about how they can subscribe to updates on the project

The way that Announcements lists work is that they show the latest announcement at the top, and the oldest announcement at the bottom. Because we want visitors to start with the brief summary, we need to create the announcements in reverse chronological order. Doing it this way means that you don't need to fiddle around with the design of the Announcements list, and can just get straight to work.

To start on the first announcement, click the Add New Announcement link. This opens the New Item window. The last item that we want to show in the list is Subscribe For Updates, so create this first. Leave the body for the moment; we just want to create the order first, and then we will come back in the next step and write the first cut at the content (see Figure 3-14).



**FIGURE 3-14** Write the first announcement.

After you enter the Title, click OK to be taken back to the Welcome To Project Delta Announcements list. The announcement that you just created appears in the list (see Figure 3-15).

Now go through and create these other four announcements, in this order:

- Key Contact Person
- The People of the Project
- The Objectives of the Project
- About the Project

When you finish, the Announcements list has the five announcements in the correct order (see Figure 3-16).

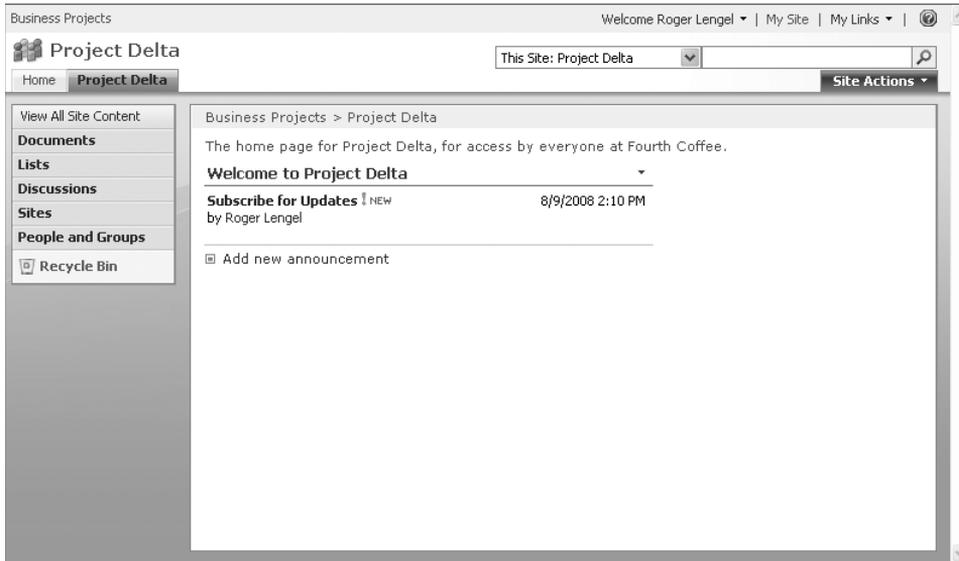


FIGURE 3-15 Your first announcement is displayed in the Announcements list.

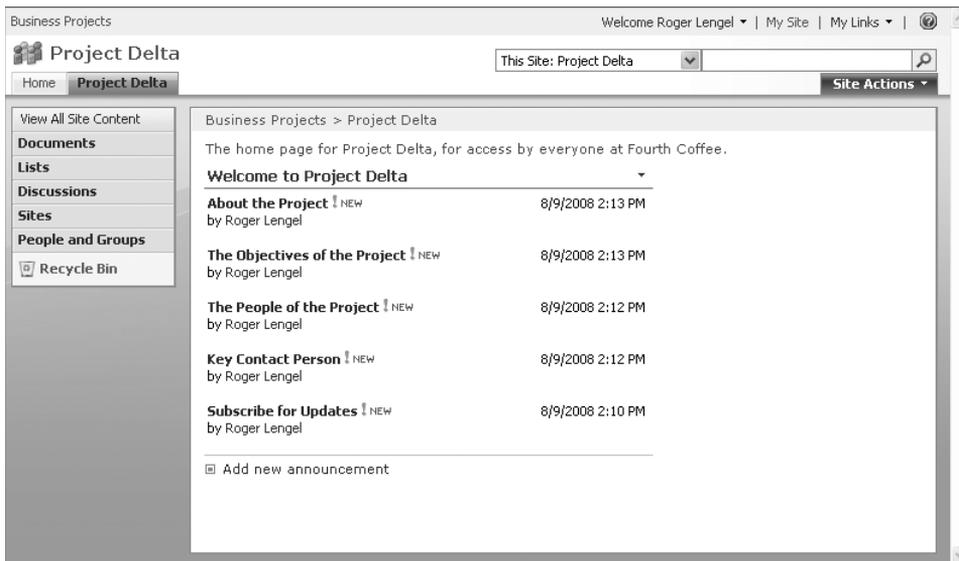


FIGURE 3-16 The Announcements list displays the five announcements.

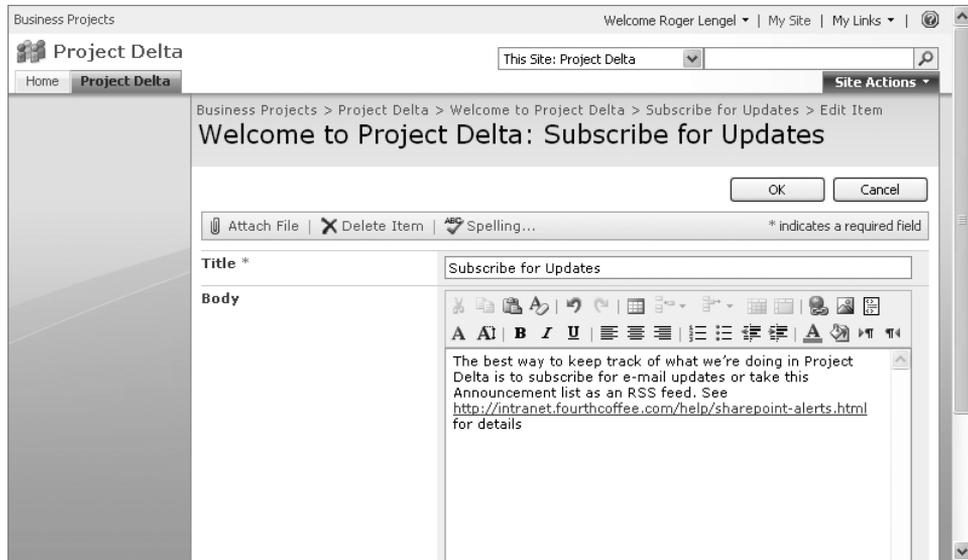
## Step 6. Write the Announcements

You have the structure of what people will see when they come to the Everyone Else site, and now it is time to add the first cut of the content into each announcement.

Let's start with the Subscribe For Updates one. From the list you just created, click Subscribe For Updates. This opens the announcement in its own screen, so you can read everything that it says. What we want to do, however, is to edit the announcement. So click the Edit Item button to change back to the original editable screen that you had when you first wrote the title. Go ahead and write a paragraph—or at least a couple of sentences—about how to subscribe for updates.

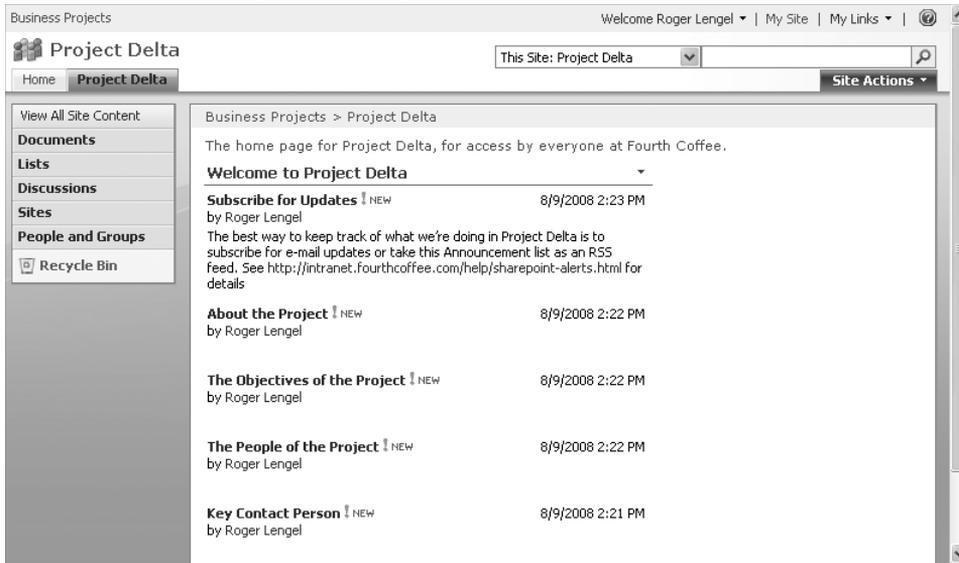
For example, Roger would write something like the following for Project Delta (see Figure 3-17):

*The best way to keep track of what we're doing in Project Delta is to subscribe for e-mail updates or take this Announcements list as an RSS feed. See <http://intranet.fourthcoffee.com/help/sharepoint-alerts.html> for details*



**FIGURE 3-17** Write the announcement for Subscribe for Updates.

When you finish, click OK. You are taken back to the main page, and what you have just written appears there. This means that anyone visiting the main page can see at a glance how to subscribe to updates about Project Delta (see Figure 3-18).



**FIGURE 3-18** The Announcements list shows an at-a-glance view of each announcement.

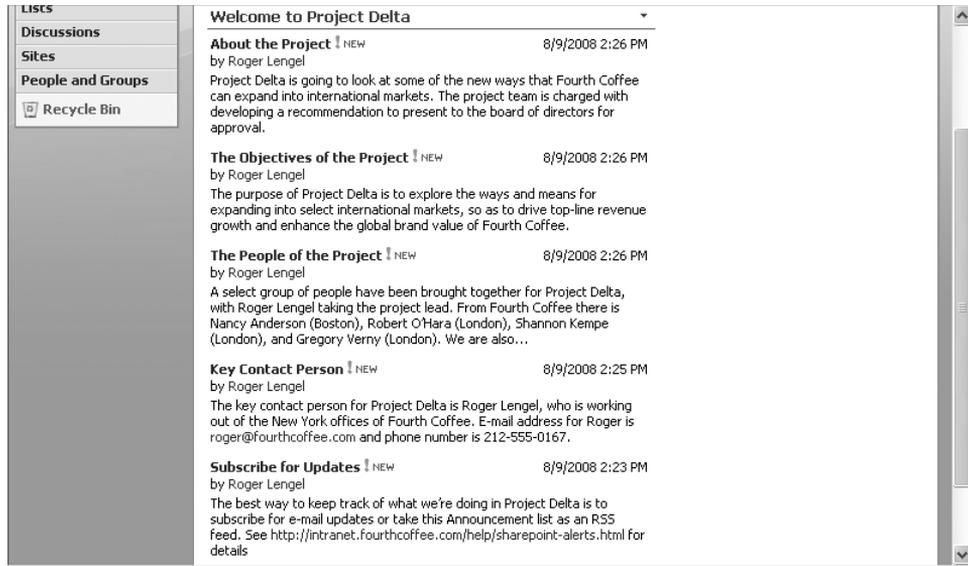
Now go ahead and fill out all of the other ones, too—you have to do them in reverse order or SharePoint will change the ordering from what you’ve set up already.

Here are examples of what Roger could write for each announcement in Project Delta:

- **Key Contact Person.** The key contact person for Project Delta is Roger Lengel, who is working out of the New York offices of Fourth Coffee. E-mail address for Roger is roger@fourthcoffee.com and phone number is 212-555-0167.
- **The People of the Project.** A select group of people have been brought together for Project Delta, with Roger Lengel taking the project lead. From Fourth Coffee there is Nancy Anderson (Boston), Robert O’Hara (London), Shannon Kempe (London), and Gregory Verny (London). We are also working with two external firms—Trey Research is providing key market research information through Matthew Carroll (London) and Yvonne McKay (Australia), and Fabrikam, Inc. is supplying marketing strategy direction through Laura Giussani (Edinburgh) and Eric Gilmore (France).
- **The Objectives of the Project.** The purpose of Project Delta is to explore the ways and means for expanding into select international markets, so as to drive top-line revenue growth and enhance the global brand value of Fourth Coffee.

- **About the Project.** Project Delta is going to look at some of the new ways that Fourth Coffee can expand into international markets. The project team is charged with developing a recommendation to present to the board of directors for approval.

After the five announcements have been created, the main page of the Everyone Else site shows a snapshot for each one (see Figure 3-19).



**FIGURE 3-19** The completed Announcements list with the five announcements

## Step 7. Create the Links List

Because the Everyone Else site is the top-level site for our project, we need to provide a way for linking to the two subsites for the project. Using a Links list is the best way to do this, because it supports security trimming, which means that it will show only specific links to the people who are supposed to see them. When someone comes to the Everyone Else site, SharePoint looks to see whether they are a member of the project team or the sponsors and stakeholders group. If they are, SharePoint displays the link to the appropriate subsite; otherwise the links are not displayed. Right now, we need to set up the Links list.

Follow the same approach as we did in Step 3 when we created the Announcements list, but this time, create a Links list. Click Links from the Tracking column (see Figure 3-20).

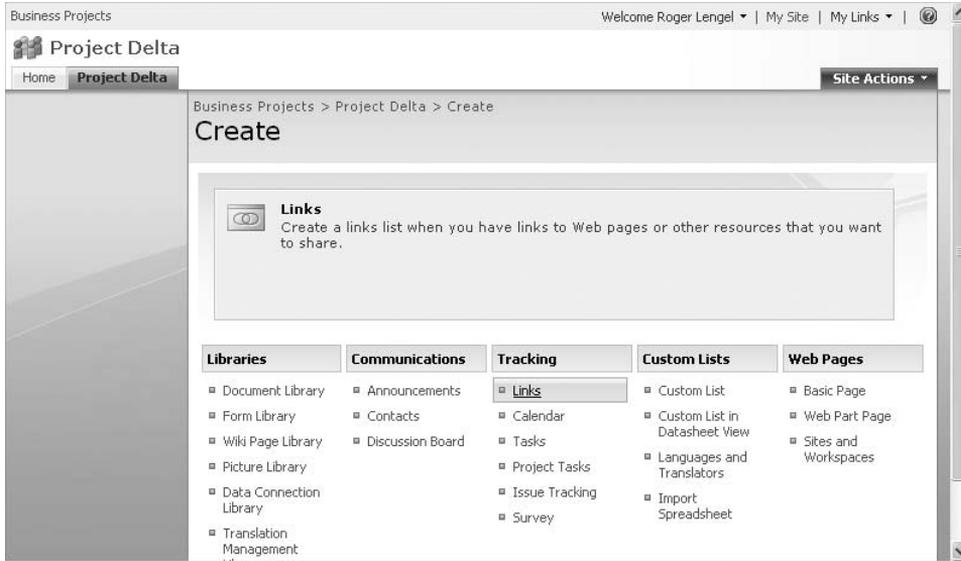


FIGURE 3-20 Add a Links list to the Everyone Else site.

Name the Links list **Project Delta Subsites**, give it a description, do not display it on the Quick Launch bar, and click Create when you are done (see Figure 3-21).

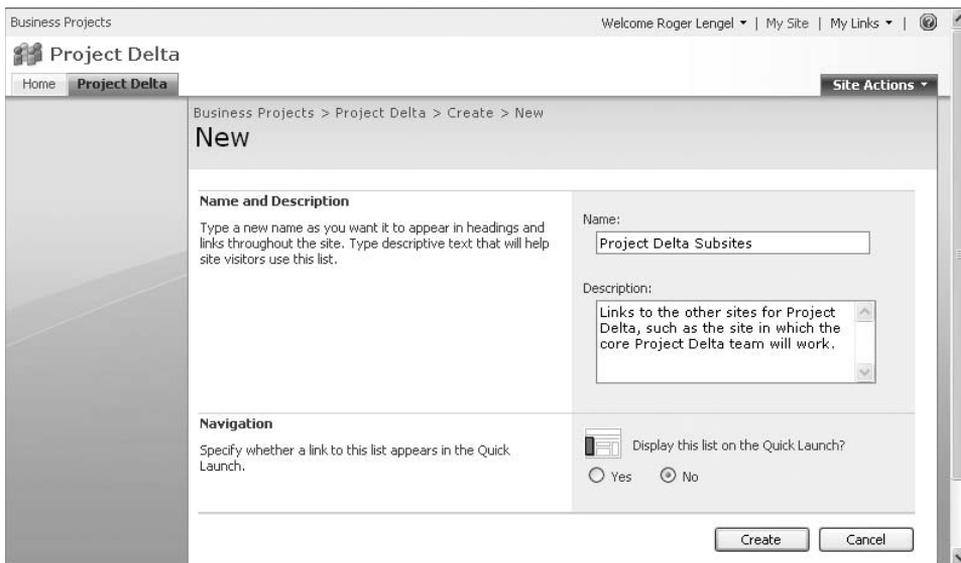


FIGURE 3-21 Give the Links list a name and description.

## Step 8. Add the Links List to the Main Page

When someone visits the main page of the project, if they are a member of the project team or the sponsors and stakeholders group, we want them to see a link for getting into one or the other subsites. For this to be displayed on the main page, we need to create a Web Part for the Links list.

To add the Links list to the main page, follow the same approach that we took in Step 4 when adding the Announcements list to the main page. When you add the Links list, however, add it to the Web Part zone to the right of the page (see Figure 3-22).

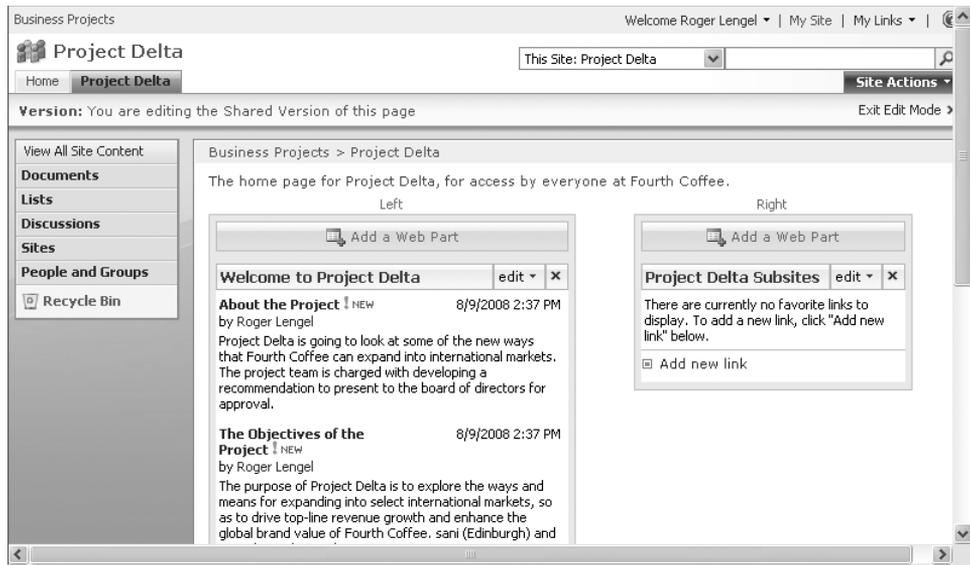
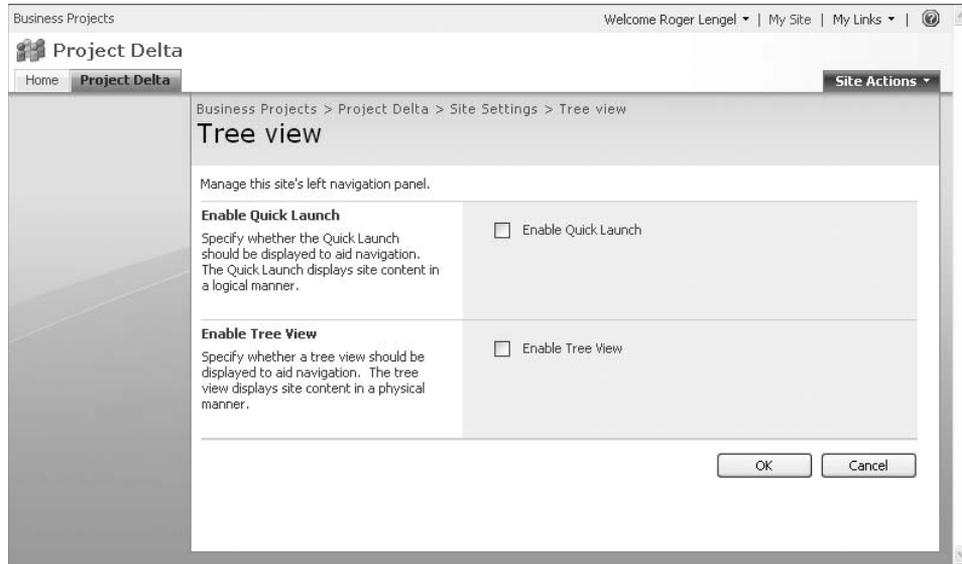


FIGURE 3-22 Add the Links list to the Web Part page.

## Step 9. Turn Off the Quick Launch Bar

One of the keys to making SharePoint easy to use is to turn off user interface elements that are not needed for a specific user group. If someone doesn't need to see something on the screen, because it doesn't add any value to their work or experience in a given SharePoint site, then turn it off. One of the default user interface elements that you can turn off in this Everyone Else site is the Quick Launch bar.

Turning off the Quick Launch bar involves going into the Site Settings area, by clicking Site Actions and choosing Site Settings. Under the Look And Feel column, choose Tree View. Clear the Enable Quick Launch check box, and then click OK (see Figure 3-23).

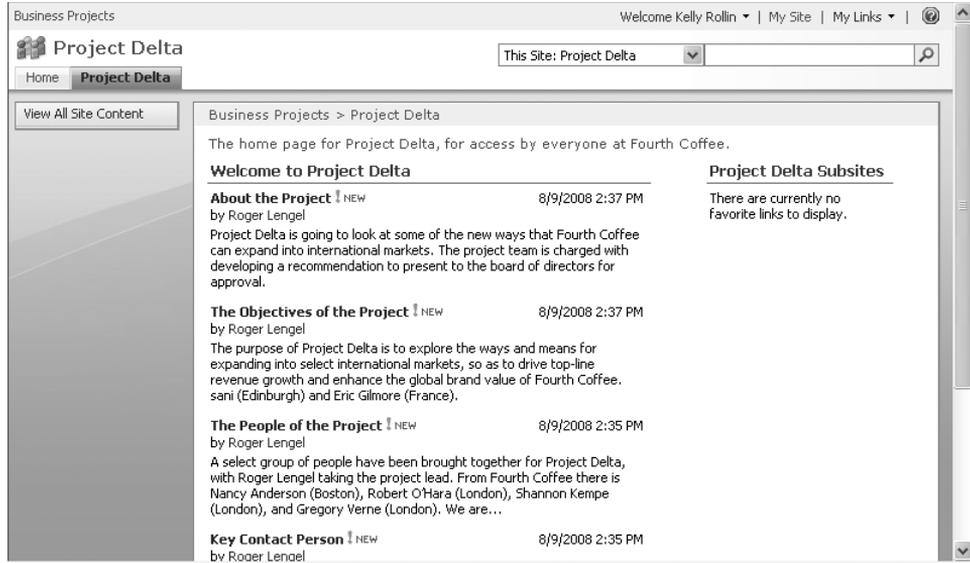


**FIGURE 3-23** Turn off the Quick Launch bar.

## Step 10. Pretend to Be a Visitor to the New Site

With the overall Everyone Else site set up and populated with the initial Announcements and links lists, and the Quick Launch bar turned off, visit a colleague who only has Read access rights to the Everyone Else site, and ask the colleague to open the main page. The colleague will be able to see what you set up, but will not have the ability to add new announcements or new links. And that's what you want—the colleague can read what you have prepared, but can't change it.

Because Roger's boss, Kelly Rollin, works just down the hall from Roger's office, he pops over and asks her to visit the new site. Roger is delighted to note that he's set it all up correctly, and although Kelly can read what he's written, she does not have the ability to make changes—specifically, the Site Actions menu does not appear for Kelly whereas it did for Roger, and she is unable to add new items to the Announcements or Links lists (see Figure 3-24).



**FIGURE 3-24** A visitor can read the information on the Everyone Else site, but cannot make changes.

## ■ Create a SharePoint Site for the Project Sponsors and Stakeholders

The second site to create is for the project sponsors and stakeholders. The key is to create it as a subsite within the Everyone Else site, not directly under the Business Projects area. To do this, go to the Everyone Else site that you have just created, click Site Actions, and then click Create to get going.

### Step 1. Create a Team Site and Set the Permissions

The sponsors and stakeholders site can be based on one of the existing templates—to start with, it needs a place for announcements, a place for documents, and a calendar for planning upcoming meetings and noting key milestones. The Team Site collaboration template will be fine for this purpose.

Fill out the details to create the new site (see Figure 3-25):

- The title of the new site, noting that it's for the sponsors and stakeholders.
- A description for the new site.
- The URL name for the new site.

- The template on which to base the new site, in this instance Team Site.
- The permissions for the new site. Because this stakeholders site will be used by a specific set of people, click Use Unique Permissions.
- Whether to display the site on the Quick Launch bar of the parent site—this should be a No. We will link the two together through the Links list, not the Quick Launch bar (which we have actually turned off already!).
- Say Yes to using the top link bar from the parent site.

**New SharePoint Site**

Use this page to create a new site or workspace under this SharePoint site. You can specify a title, Web site address, and access permissions.

**Title and Description**  
Type a title and description for your new site. The title will be displayed on each page in the site.

Title: Project Delta Sponsors & Stakeholders  
Description: The sponsors and stakeholders site for Project Delta.

**Web Site Address**  
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.  
For example, http://intranet.fourthcoffee.com/sites/projects/delta/*sitename*

URL name: http://intranet.fourthcoffee.com/sites/projects/delta/sponsors

**Template Selection**

Select a template:  
Collaboration Meetings Enterprise  
Team Site  
Blank Site  
Document Workspace  
Wiki Site

Create

**FIGURE 3-25** Give your new site a name and description, and use the Team Site template.

When you are done, click Create. SharePoint then creates the new site under the Everyone Else site. As happened when you created the Everyone Else site, you are asked to create permissions for the new Sponsors and Stakeholders site (see Figure 3-26). Enter these settings:

- **Visitors.** The only people who we want to access the Sponsors and Stakeholders site are the sponsors and stakeholders themselves. So for the moment, give the group a name but don't put anyone in it.
- **Members.** This is the group where all the names of the sponsors and stakeholders will eventually be added. In the case of Project Delta, an immediate person to add is Roger's boss, Kelly Rollin.

- **Owners.** Include the name of the lead business sponsor, and the name of your SharePoint support person from IT. In the case of Project Delta, the latter is Gareth Chan. Also, while the site is being designed, your name will need to be there too.

The screenshot shows the 'Permissions' page in SharePoint. It is divided into three sections, each for a different permission level. Each section has a radio button to 'Create a new group' (selected) and a radio button to 'Use an existing group'.

- Visitors to this Site:** Description: 'Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.' Group name: 'Project Delta Sponsors & Stakeholders Visitors'. Below the name is an empty text box. A button 'Add all authenticated users' is visible.
- Members of this Site:** Description: 'Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.' Group name: 'Project Delta Sponsors & Stakeholders Members'. Below the name is a text box containing 'Kelly Rollin'.
- Owners of this Site:** Description: 'Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.' Group name: 'Project Delta Sponsors & Stakeholders Owners'. Below the name is a text box containing 'Roger Lengel; Gareth Chan; Martin O'Donnell'.

**FIGURE 3-26** Set the permissions for the groups that have access to the Sponsors and Stakeholders site.

When you are done, click OK.

## Step 2. Add a Link to the New Site in the Everyone Else Site

With this Sponsors and Stakeholders site created, go to the main page of your new site, and copy the URL from your Web browser to the Clipboard. You'll need this in a moment for creating a link between the Everyone Else site and the Sponsors and Stakeholders site. After you have copied the address of the site to the Clipboard, go to the main page of the Everyone Else site and click the Links list.

Click New to open the New Item form, and paste the Web address for the Sponsors and Stakeholders site into the URL field. Type a description—**The SharePoint site for the Sponsors and Stakeholders for Project Delta**—and any notes that you think are pertinent. Then click OK (see Figure 3-27).

This takes you back to the main list of links. For the new link you have just created, point to the item, click the arrow on the right side of the name, and then choose Manage Permissions (see Figure 3-28).

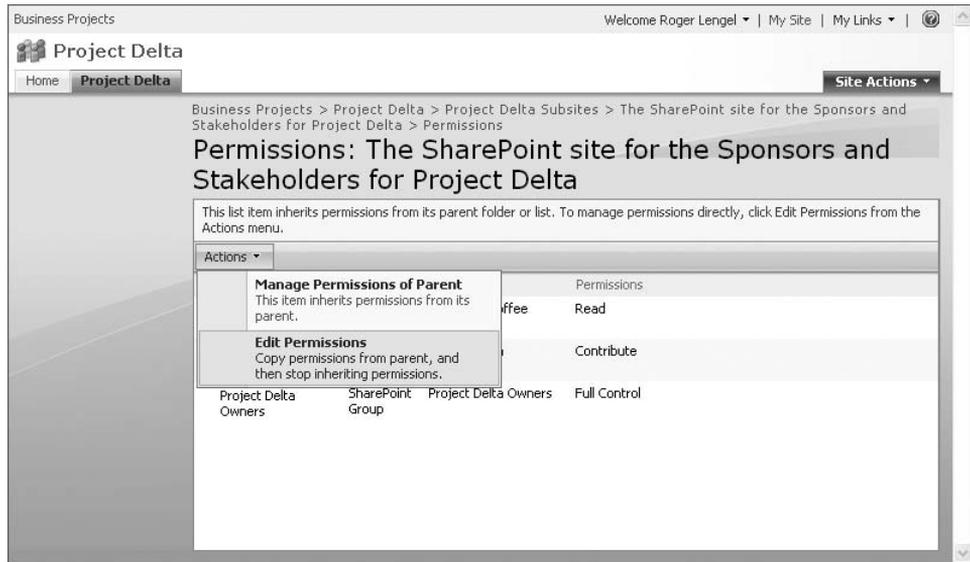
The screenshot shows the 'New Item' form for 'Project Delta Subsites'. The breadcrumb trail is 'Business Projects > Project Delta > Project Delta Subsites > New Item'. The form has two sections. The top section has a 'URL \*' field with the value 'http://intranet.fourthcoffee.com/sites/projects/delta/sponsors/defe' and a 'Type the description:' field with the value 'The SharePoint site for the Sponsors and Stakeholders for Project'. The bottom section has a 'Notes' field with the value 'A private place for the sponsors and stakeholders of Delta to work together and share documents.' There are 'OK' and 'Cancel' buttons at the bottom of each section.

FIGURE 3-27 Create a link to the Sponsors and Stakeholders site.

The screenshot shows the 'Project Delta Subsites' list view. The breadcrumb trail is 'Business Projects > Project Delta > Project Delta Subsites'. The list contains one item: 'The SharePoint site for the Sponsors and Stakeholders for Project Delta'. The 'Notes' column for this item contains the text 'A private place for the sponsors and stakeholders of Delta to work together and share documents.' A context menu is open over the item, showing options: 'View Item', 'Edit Item', 'Manage Permissions', 'Delete Item', and 'Alert Me'. The 'Manage Permissions' option is highlighted.

FIGURE 3-28 You need to change the permissions to see the link you just created.

What we're doing is tightly specifying who can see this link in the list, nominating people in the sponsors and stakeholders group, and eliminating anyone else. First, you need to break the tie between the wide-open permissions of the Links list in total and this specific item. Do this by clicking Actions and then Edit Permissions. This copies in the current set of permissions for the list as a whole, and then breaks the connection between the list and this particular item in the list. When you are asked to confirm this, click OK (see Figure 3-29).



**FIGURE 3-29** Copy in the current permissions so you can edit them.

The permissions list now looks a bit different, with the essential difference being that you can select the check boxes of individual items (see Figure 3-30).

What you want to do now is to add the sponsors and stakeholders groups you created in Step 1 to the link item, and delete the others. Click New, and then Add Users. To search for groups to add, click the Browse icon—the one that looks like an open book—at the lower-right of the Users/Group box. On the Select People And Groups form, find the names of the various groups by searching for the name of your project. Roger entered **delta**, and he found the three relevant groups. Select the group names you want to add, and click the Add button. Then click OK (see Figure 3-31).

Set the permissions for this link to Read – Can View Only. Apart from the Owners group (which we'll fix in a moment), they do not need to be able to control, design, or contribute in this case, and they don't need to get an e-mail message advising them of this new link either (see Figure 3-32). After you are done, click OK.

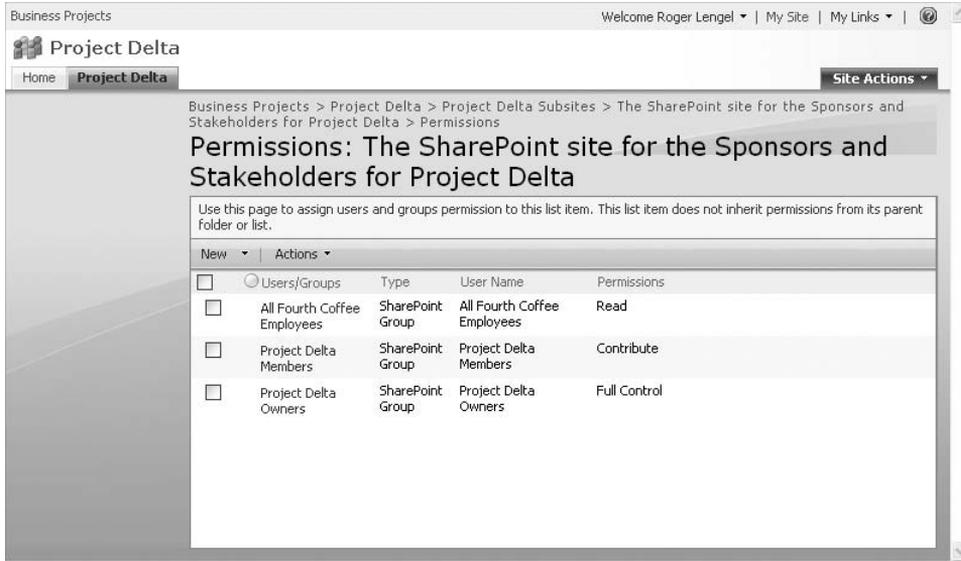


FIGURE 3-30 Change permissions for the groups.

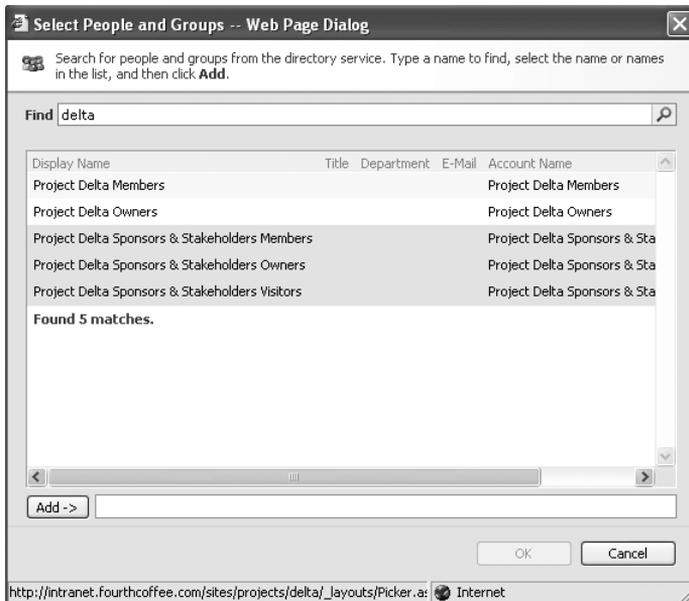


FIGURE 3-31 Select groups to add to the permissions list.

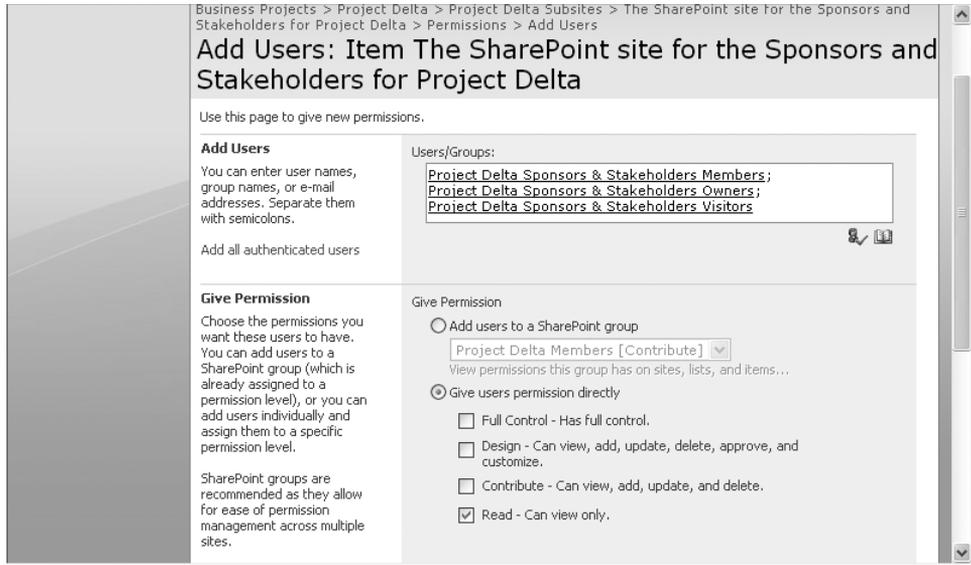


FIGURE 3-32 Set the permissions to Read for the various groups.

There are two more things to do. First, find the relevant Owners group in the new list, and give them higher permissions. Select the group’s check box. On the Actions menu, click Edit User Permissions (see Figure 3-33). Then update the group to Full Control – Has Full Control, and click OK (see Figure 3-34).

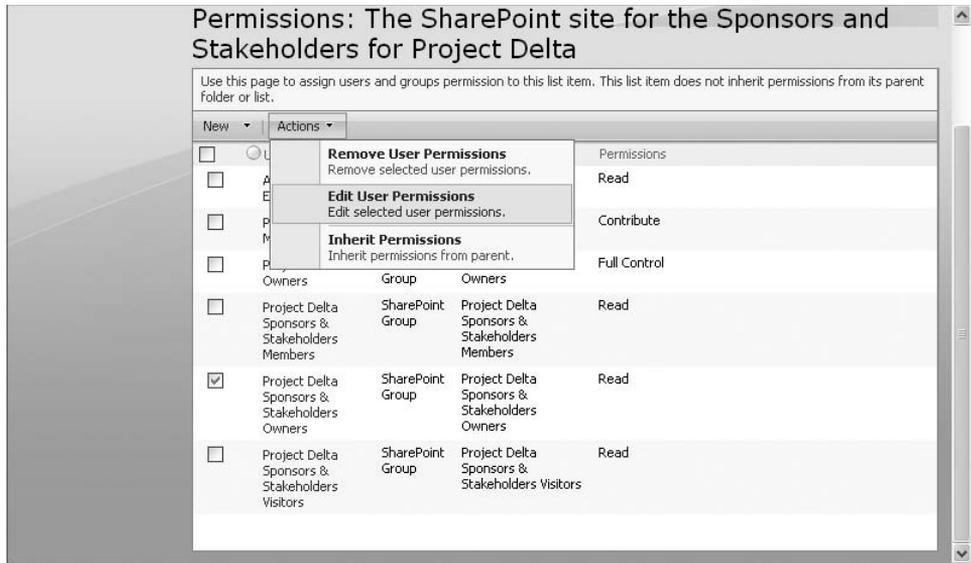


FIGURE 3-33 Change the user permissions for the Owners group.

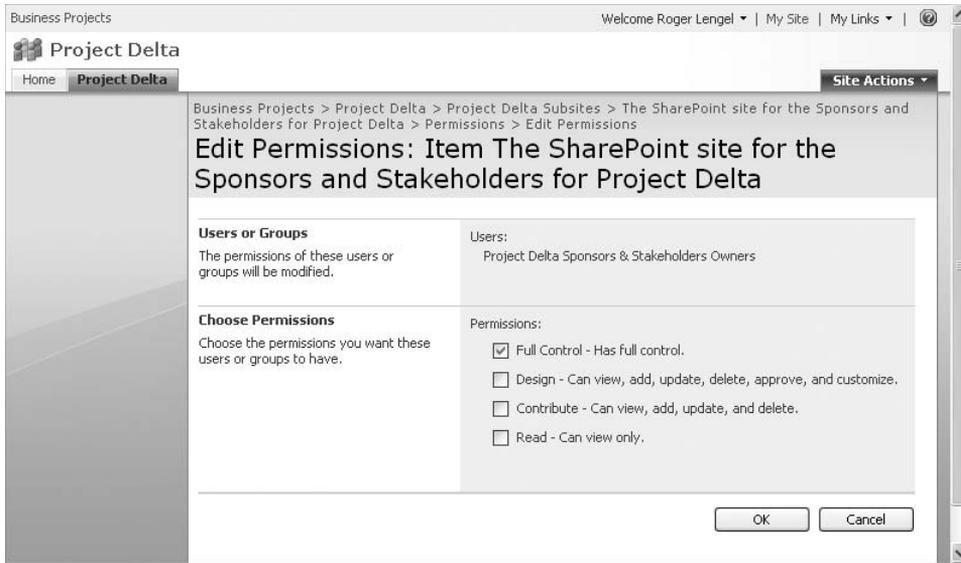


FIGURE 3-34 Give the Owners group Full Control.

The second and final thing to do is to remove the names of people who are not permitted to see the link item. Do this by selecting the check box next to their names, and then clicking Remove User Permissions from the Actions menu. Confirm by clicking OK in the dialog box (see Figure 3-35).

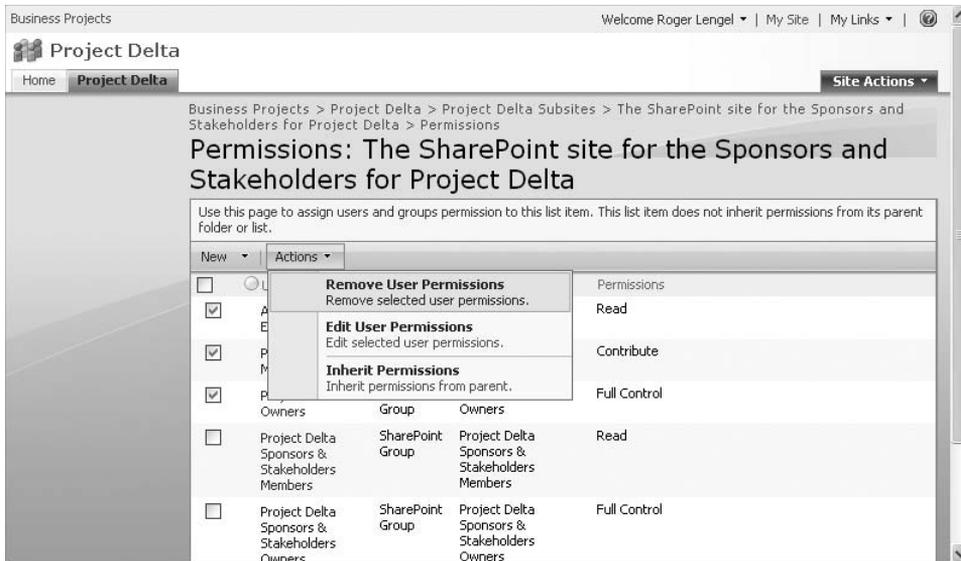


FIGURE 3-35 Delete the permissions for groups that should not see the link.

## Step 3. Visit Everyone Else as a Member of the Stakeholders Group

To ensure that the rights have been created properly, log in to SharePoint as someone who is a member of the sponsors and stakeholders group you just set up, and go to the top-level Everyone Else site. On the Project Delta Subsites links list, you should see *The SharePoint site for the Sponsors and Stakeholders for Project Delta* link. If you can, that's a good sign! Click the link to open the new site. Roger has asked Kelly to take a look (given she's a member of the group), and yes, it's there (see Figure 3-36)!

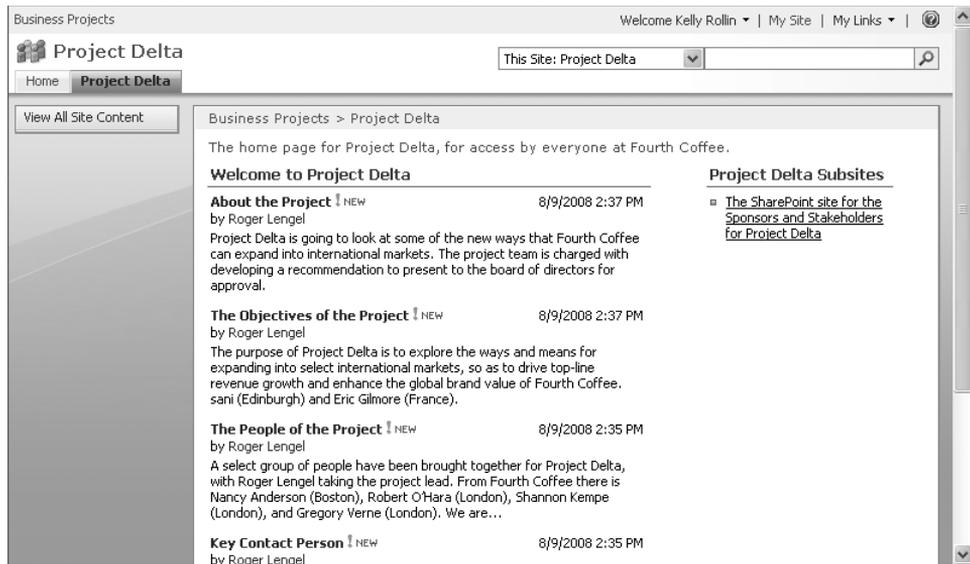


FIGURE 3-36 Members of the sponsors and stakeholders group see the link.

## Step 4. Visit Everyone Else as a Non-Member

Now log out from SharePoint, and log back in as someone who is not a member of the stakeholders group, and again visit the Everyone Else site. This time, you should not see the The SharePoint Site For The Sponsors And Stakeholders For Project Delta site listed in the Project Delta Subsites Links Web Part. If you don't, it has been set up correctly! If you do, go have another look at Step 2.

Roger asked Nancy Anderson to test it, and because she is not a member of the sponsors and stakeholders group, she can't see the link (see Figure 3-37).

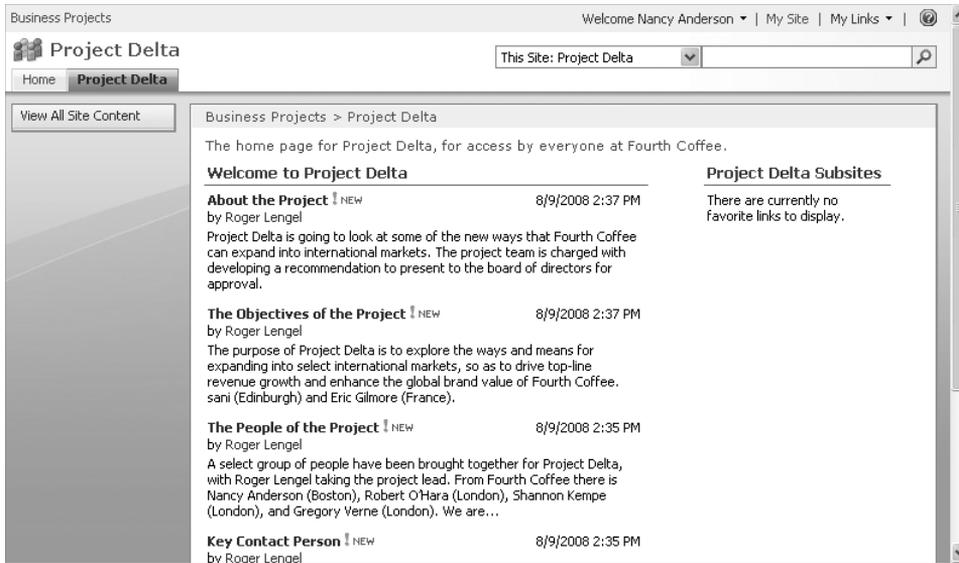


FIGURE 3-37 People who are not members of the sponsors and stakeholders group don't see the link.

## ■ Create a SharePoint Site for the Project Team

The final site to create is the actual working place for the project team. Like the stakeholders site, the project team site will allow limited access to the people who are actually directly on the team—the purpose is to give them a secure place to work. Like the stakeholders site, the project team site should be created directly under the Everyone Else site, and a link created within the Everyone Else site to the project team site.

### What Does the Team Site Actually Look Like?

At the beginning of all things, the team site needs seven areas:

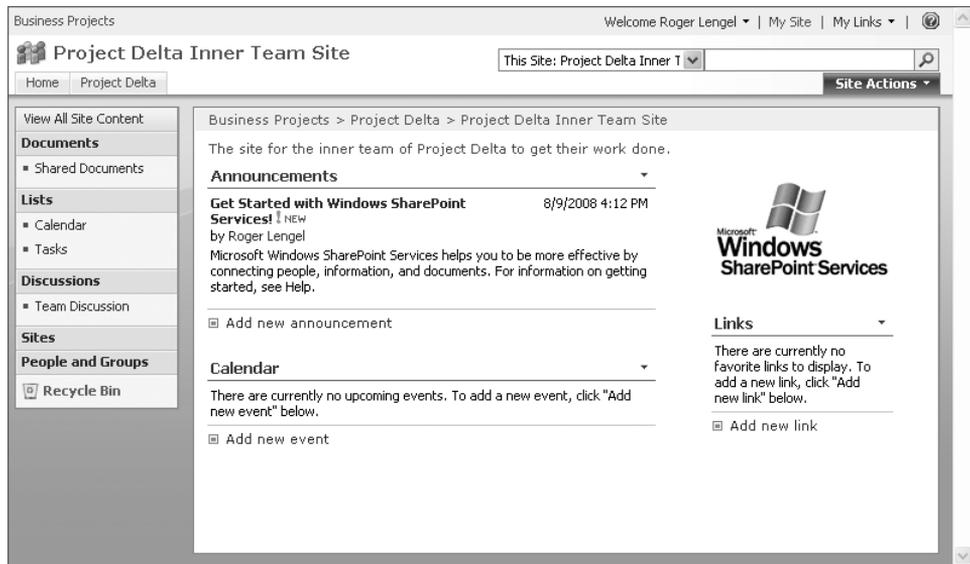
- An announcements list
- A team calendar
- A team task list
- A team document library
- A team wiki
- A team discussion list
- A team blog

## Step 1. Create the Team Site, Groups, and Link

As with the stakeholder site, start with the basic Team Site template in SharePoint and set up the project team site. The Team Site template does not include the wiki, so we will add that in step 2. Look back at the five steps under the sponsors and stakeholder site section detailed earlier:

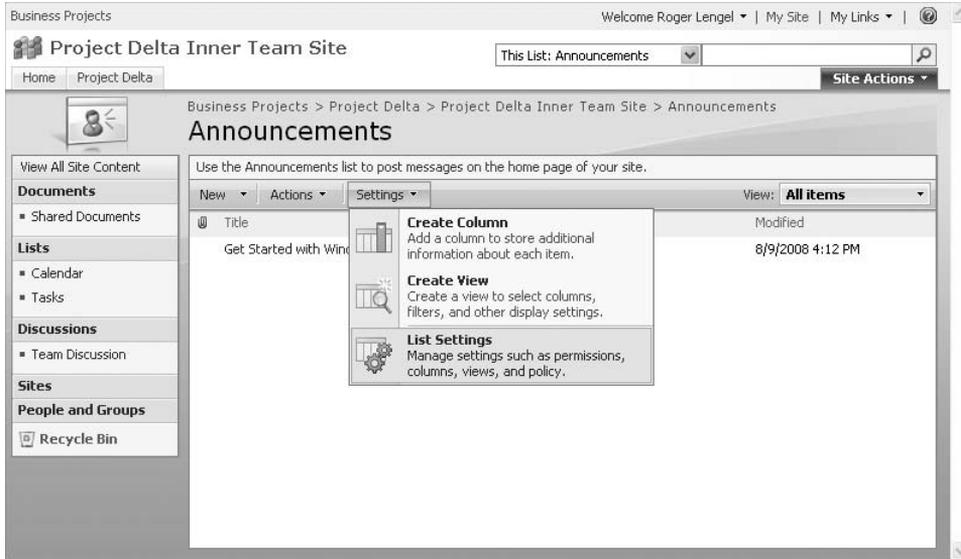
1. Create a Team Site.
2. Set Up the Groups for the Inner Team Site.
3. Add a link to the Inner Team site from the Everyone Else Links list and set the permissions for the Inner Team groups. The Visitors group should have Read access, the Members group Contribute access, and the Owners group Full Control. Remove all the other groups that will not have access to the Inner Team site.
4. Visit the Everyone Else site as a member of the Inner Team group.
5. Visit the Everyone Else site as a non-member of the Inner Team group.

After you have completed the five steps above, your new team site will be displayed (see Figure 3-38):



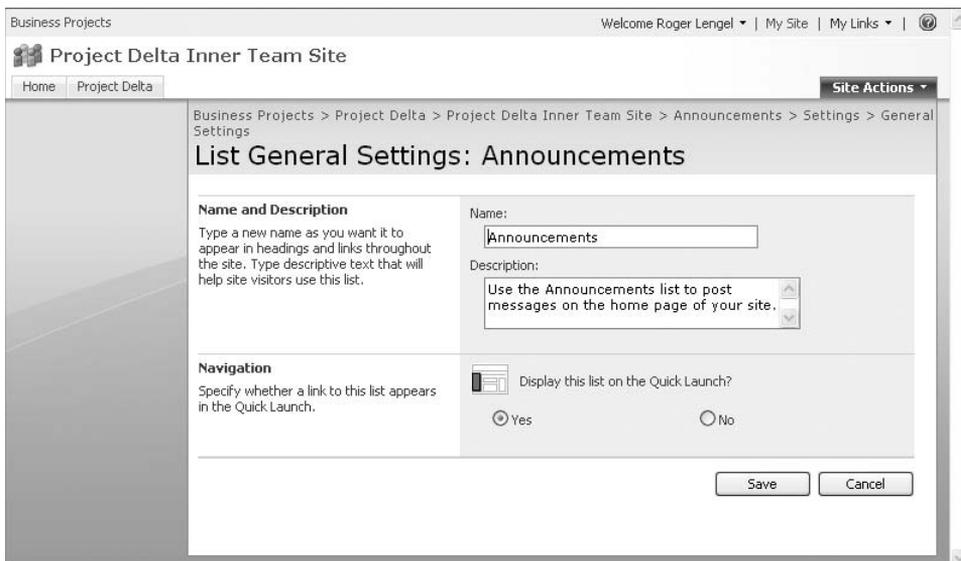
**FIGURE 3-38** Your new team site for the Inner Team on Project Delta

By default, the Announcements list is not linked to the Quick Launch bar, but we want it to be linked. To create the link, open the Announcements list by clicking its name in the Web Part page, and from the Settings menu, click List Settings (see Figure 3-39).



**FIGURE 3-39** Change the List Settings to display the Announcements list on the Quick Launch bar.

Under the General Settings column, choose Title, Description And Navigation. On the List General Settings: Announcements page, click Yes to displaying this list on the Quick Launch bar, and then click Save (see Figure 3-40).

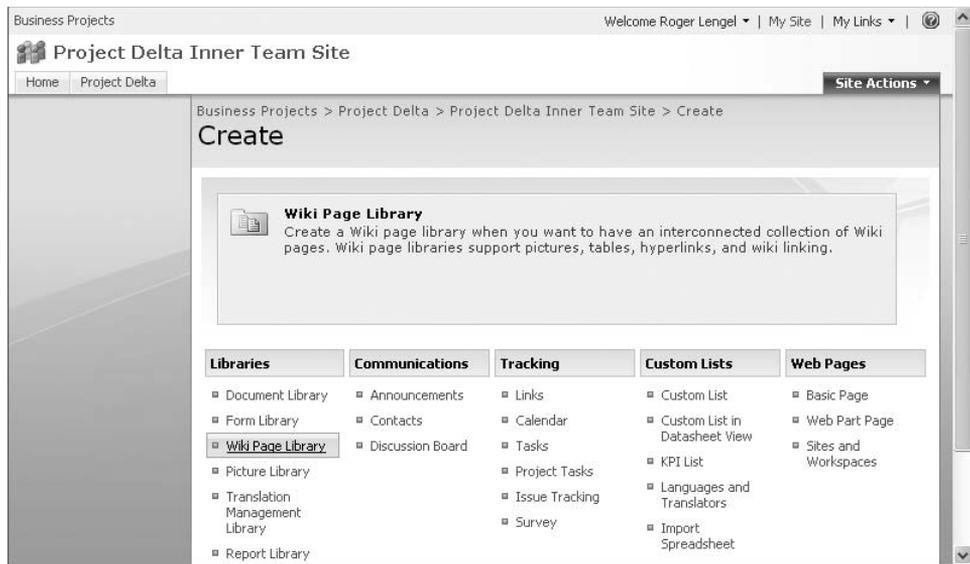


**FIGURE 3-40** Click Yes to display the Announcements list on the Quick Launch bar.

## Step 2. Add a Wiki Page Library

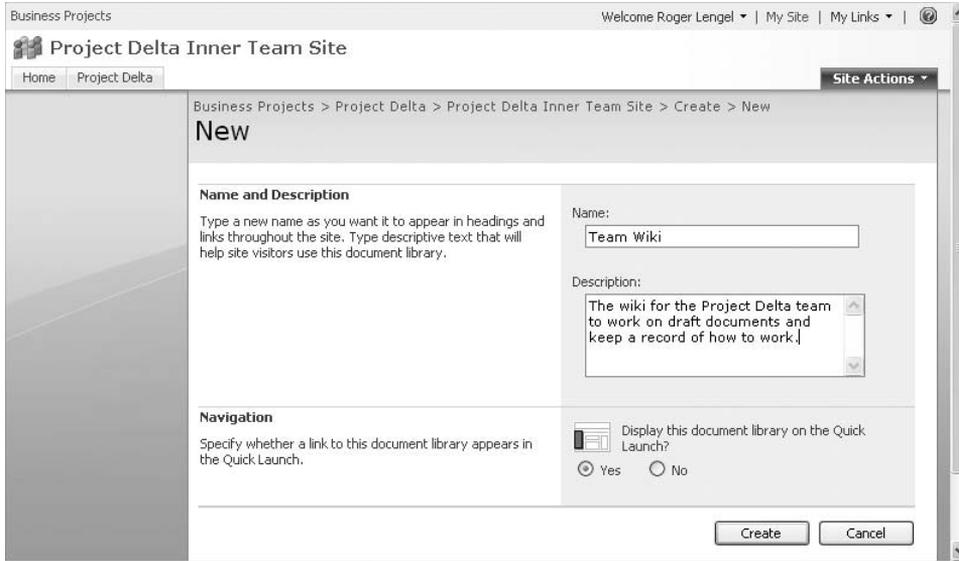
The team is going to need a wiki for its work. The SharePoint Team Site template does not include one by default, so we need to add one. In SharePoint, there are two options when creating a wiki capability: as a subsite or as a wiki page library. We'll explore the difference in a moment.

Ensure that you are within your Inner Team site. Click Site Actions in the upper-right corner of the screen, and then click Create from the menu. After the Create page opens, choose Wiki Page Library under the Libraries column (see Figure 3-41).



**FIGURE 3-41** Add a wiki page library from the Libraries column.

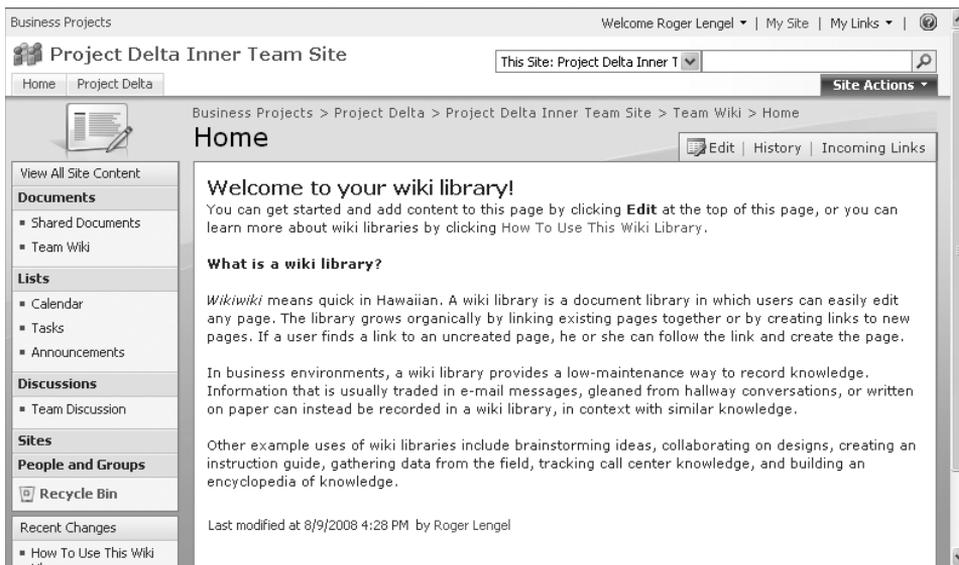
You are asked to enter a name and description for your new wiki page library, and whether you want it to display on the Quick Launch bar. Enter the first two, and say Yes to the Quick Launch option. Click Create when you are done (see Figure 3-42).



The screenshot shows the 'New' form in a SharePoint environment. The breadcrumb trail is 'Business Projects > Project Delta > Project Delta Inner Team Site > Create > New'. The form is titled 'New' and has a 'Site Actions' dropdown menu. It is divided into three main sections: 'Name and Description', 'Navigation', and 'Display this document library on the Quick Launch?'. The 'Name and Description' section has a 'Name' field containing 'Team Wiki' and a 'Description' text area containing 'The wiki for the Project Delta team to work on draft documents and keep a record of how to work.'. The 'Navigation' section has a checkbox for 'Display this document library on the Quick Launch?' which is checked. At the bottom, there are 'Create' and 'Cancel' buttons.

FIGURE 3-42 Give the wiki page library a name and description.

After SharePoint has created the Team Wiki, it will be displayed under Documents in the Quick Launch bar (see Figure 3-43).

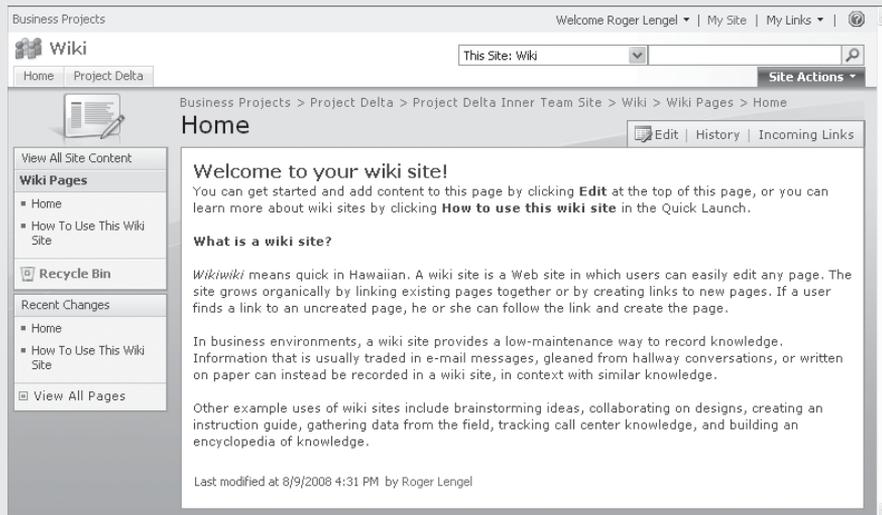


The screenshot shows the 'Home' page of the 'Team Wiki' library. The breadcrumb trail is 'Business Projects > Project Delta > Project Delta Inner Team Site > Team Wiki > Home'. The page title is 'Home' and it has 'Edit', 'History', and 'Incoming Links' options. The main content area is titled 'Welcome to your wiki library!' and contains introductory text and a section titled 'What is a wiki library?'. The left sidebar (Quick Launch bar) shows a 'Documents' section with 'Team Wiki' listed under it. Other sections in the sidebar include 'Lists', 'Discussions', 'Sites', 'People and Groups', 'Recycle Bin', and 'Recent Changes'.

FIGURE 3-43 Wiki page libraries display under the Documents title on the Quick Launch bar.

## WHAT'S THE DIFFERENCE BETWEEN A WIKI SITE AND WIKI PAGE LIBRARY?

SharePoint offers two ways to set up a wiki—either as a SharePoint site or as a page library. What's the difference? With respect to what the team can do with the wiki, whether it is created as a site or a page library has little impact. Either will be fine. Here is what a wiki site looks like when it has been created. Notice that the whole focus of the site is the wiki.



After you have created a wiki site, you can add other libraries and lists, just like you can with other sites.

A wiki page library has subtle differences:

- The wiki page library shows under the Documents heading on the Quick Launch bar, and a wiki site shows under the Sites heading on the Quick Launch bar.
- A wiki page library can be used within the context of the current team site, and you can see the other parts of the team site—the document library, the calendar, and so on—when you are working in the wiki page library. The wiki site is a bit different—you go down into the site and get a different Quick Launch side panel. It feels like a different place.

For teams that will orient their work together primarily based on a wiki, start with the wiki site. Or for intranet applications where what you need is a wiki to capture intelligence and let people write down what they know, go for the wiki site. For the purposes of this book, a wiki is one of the capabilities needed by the team, rather than the focus of it, and so a wiki page library is the way to go.

### Step 3. Add the Wiki Page Library to the Main Page

When people first visit the Inner Team site, they will see the Team Wiki link under Documents. We want to go a step beyond that, however, and give a snapshot overview of the contents of the wiki page library itself. To do this, we add a Web Part for the wiki page library.

Once again, click Edit Page from the Site Actions menu. This switches the main page of the Project Delta Inner Team site into a design layout mode as we did with the Everyone Else site, so that you can add and remove Web Parts—snapshots into libraries and lists—to and from the page. After the page has switched into Edit Mode, click Add a Web Part in the Left Web Part zone. This will open a menu for choosing the desired Web Part. Select the Team Wiki check box at the bottom of the Lists And Libraries section, and then click Add (see Figure 3-44).

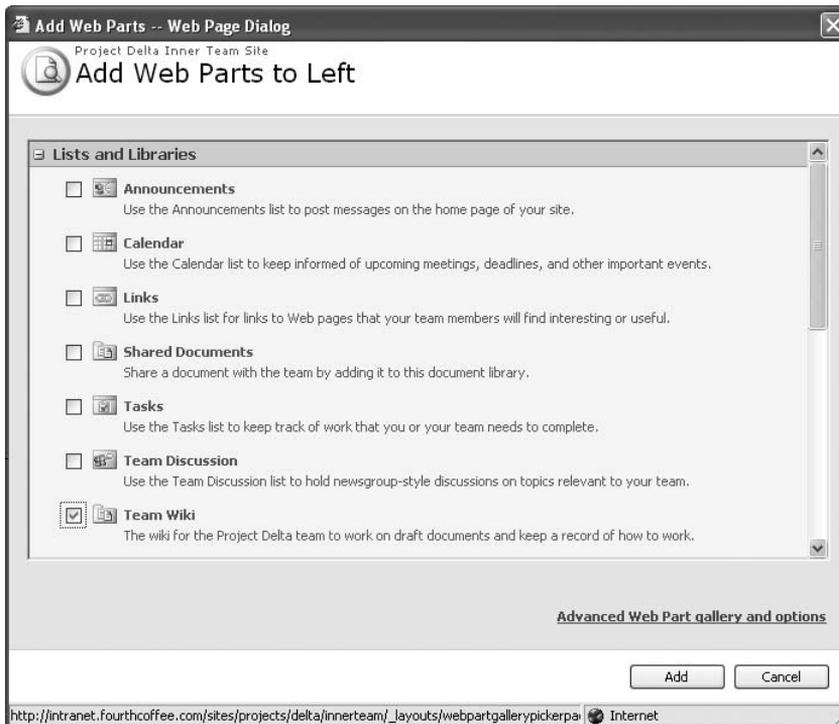
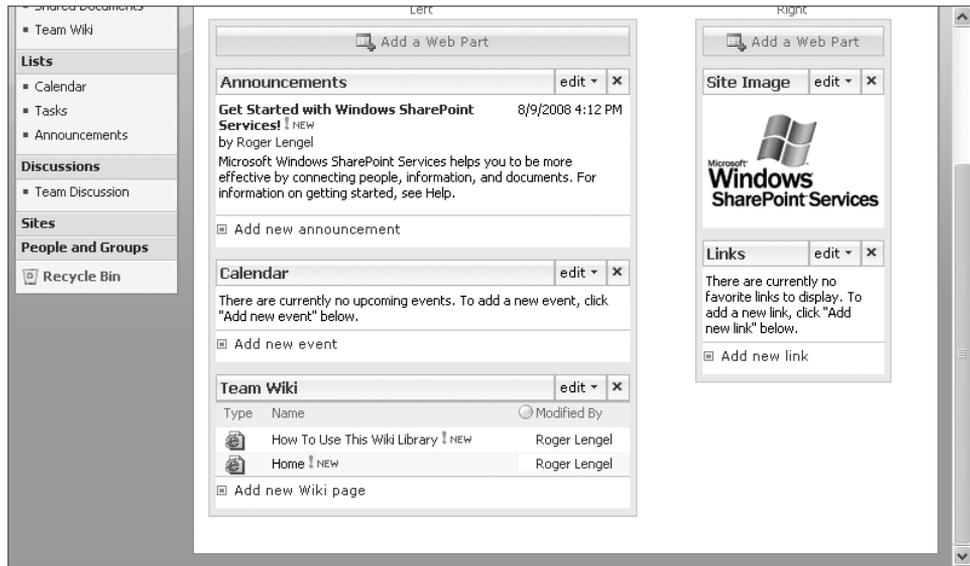


FIGURE 3-44 Add the wiki page library to the main Web Part page.

SharePoint creates the Web Part in the Left zone, and then shows you the screen still in Edit Mode. By default, the new Web Part is displayed at the top of the list, but we really want it lower in the list. To move the Web Part, drag it to where you want it to go in the list. Point to the title bar of the Web Part—Team Wiki—and then click and hold the left mouse button. Still holding the button down, drag the Web Part to the bottom of the list, and let go. A red line will move underneath the Web Part to show you where it is going to end up when you release the mouse button. If you don't drag it far enough the first time, drag it until it is at the bottom of the Web Part zone (see Figure 3-45).



**FIGURE 3-45** Drag the wiki page library to the bottom of the Web Part page.

Now scroll back to the top of the screen and click Exit Edit Mode directly under Site Actions. This puts the Inner Team Site back to work mode.

## Step 4. Revise the Home Page of the Wiki

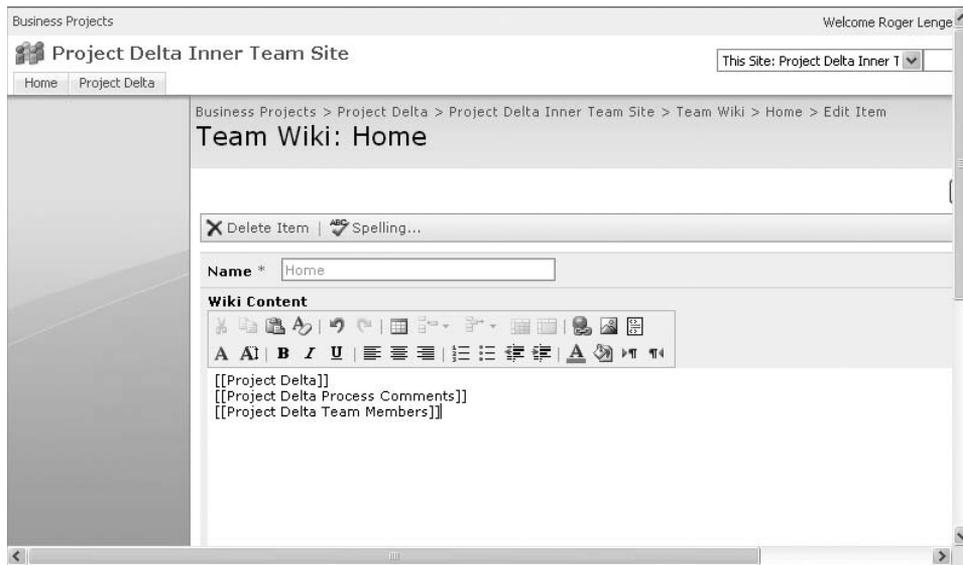
When a wiki page library is created—or a wiki site for that matter—a default home page is created with a few paragraphs of explanatory text about what a wiki is and what to use it for. Now that we have the wiki page library created, we need to get rid of that default text, and put in something that makes a bit of sense for the team.

To do this, click into the Team Wiki library (using the Quick Launch bar or the Web Part on the main page), and click Edit to revise the default text. Highlight all of the default text, and delete it.

Now type the name of three new wiki pages:

- One for the name of the project
- One for comments about the process aspects of running the project
- The final one for a page about the team members on the project

To create a clickable page name in the wiki, you have to use the SharePoint wiki markup of double square brackets before and after the page name (see Figure 3-46).



**FIGURE 3-46** Edit the home page of the wiki.

When you are done, click OK.

## Step 5. Add a Web Part for the Discussion List

When we created the Inner Team SharePoint site based on the Team Site template, a team discussion area was included. We need to add a Web Part to the main page so that team members can get a snapshot view of current discussions. Go through the same process as above, but this time add Team Discussion, and drag it in between the Calendar and Team Wiki Web Parts. And while you are at it, drag the Calendar Web Part over to the top of the Right Web Part zone, and delete the Site Image Web Part. When you are finished, your team site should look like this (see Figure 3-47):

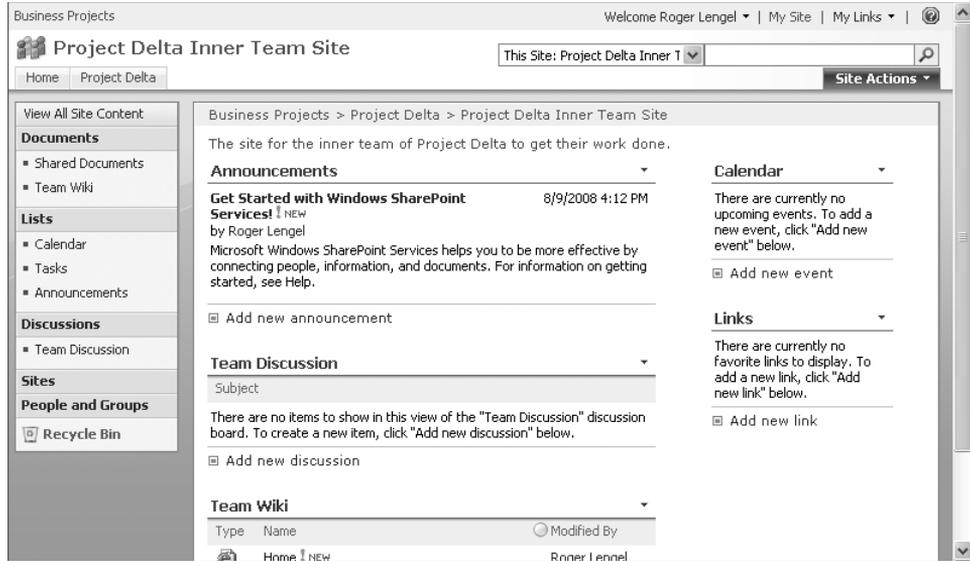


FIGURE 3-47 Your revised Inner Team site in SharePoint

## Step 6. Add the Site Users Web Part

Working with people who you can't be with in person means that everyone on the team needs some way of sharing information about who they are, how to contact them for questions, and for interaction on the shared project. With a bit of creative thought, we can use the standard SharePoint User Information Form and the associated Site Users Web Part. Creative thought is necessary because the User Information Form has no pre-defined areas for some of the information that we want to track for each user—such as their blog address, country, or even organization name. So we have to re-interpret out-of-the-box definitions to fit what we want to happen. For example, where you see the term *Department* on the User Information form, tell everyone on the team to think "Organization and Country." Where you see *About Me*, think "free form entry of interesting things about me that others can use" (see Figure 3-48). Please note the following:

- The Department field is automatically populated from Active Directory, so you will need to ask your SharePoint contact in the IT department to make that change.
- Some of the information on this page is populated from the user's My Site—About Me, responsibilities—and other pieces of information come directly from Active Directory—e-mail addresses, phone numbers, and other information.

<b>Account</b>	FOURTHCOFFEE\rogerl
<b>Name</b>	Roger Lengel
<b>Work e-mail</b>	rogerl@fourthcoffee.com
<b>About me</b>	I'm Roger, and I work on project management related to the strategy of Fourth Coffee from our New York office.  I have an MBA, and love running in Central Park when I'm not in the office.  I blog at <a href="http://www.fourthcoffee.com/blogs/roger">www.fourthcoffee.com/blogs/roger</a> .
<b>Picture</b>	
<b>Department</b>	International Marketing
<b>Title</b>	
<b>SIP Address</b>	
<b>First name</b>	Roger
<b>Last name</b>	Lengel
<b>Work phone</b>	
<b>Office</b>	
<b>User name</b>	RogerL
<b>Web site</b>	
<b>Responsibilities</b>	strategy project management, international business

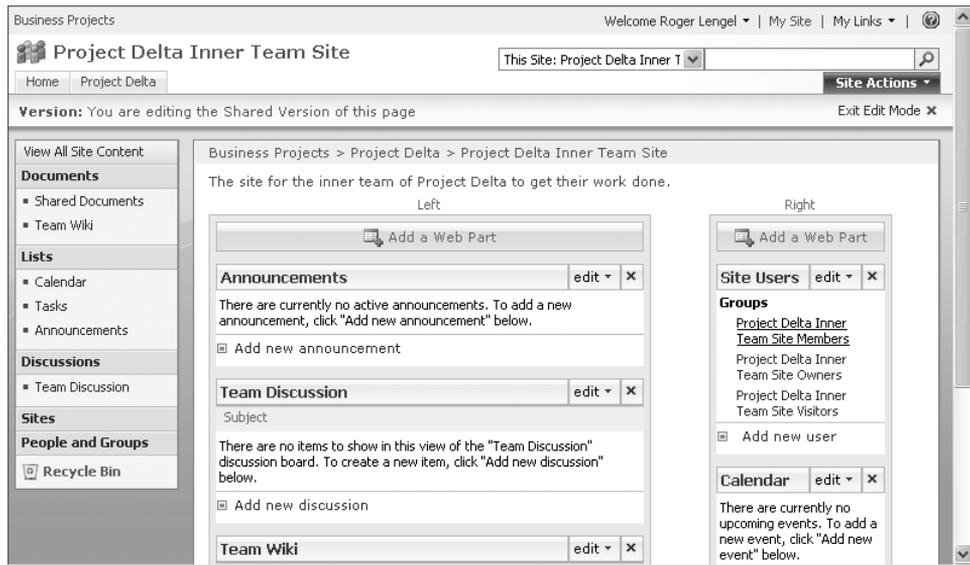
**FIGURE 3-48** The About Me area should tell other people interesting things about you.

This involves a bit of a leap of faith (or at least a shared agreement!), and you have to tell people to do something different than what the screen actually says, but there are three key benefits to doing it this way:

1. User information isn't stored in just one SharePoint site, but is rather shared across a collection of sites. So when the user updates their information in one place, it is updated everywhere. That helps minimize the amount of work people have to do when they are involved in many projects, and ensures that the information is kept consistent across all of SharePoint.
2. The Site Users Web Part displays the list of people who have access to the site along with their online presence from either Microsoft Office Communications Server 2007 or Microsoft Windows Live Messenger. This means that every time you visit the SharePoint site for your project, you can see who else is currently online, regardless of where "online" happens to be physically. They could be in their standard office, they could be in an airline lounge, they could be lying on the beach connected via their laptop and fast data connection ... but for all intents and purposes, where they are physically is irrelevant because they are accessible virtually.

- The third major benefit is that when Microsoft next releases an update to SharePoint (in 2010 or 2011), this configuration should transfer across to the upgraded edition without any specific migration work.

To add the Site Users Web Part, follow the process we undertook in the previous Step 3 section, and add it to the top of the Right Web Part zone (see Figure 3-49). (Note that the Site Users Web Part is listed under the Miscellaneous area in the Add Web Parts dialog box.)



**FIGURE 3-49** Add the Site Users Web Part to the Inner Team site.

Note that what is shown is the names of the groups that can access the Inner Team site. What we want to see is the names of the individual people. To make the change, click Edit on the Site Users Web Part while still in Edit Mode, then Modify Shared Web Part. This opens the option pane for the new Web Part. Change the setting under Display Type to Show People In This Site's Member Group, and click OK (see Figure 3-50).



FIGURE 3-50 Change the settings for the Site Users Web Part.

Turn off Edit Mode to see a list of the users of the site (see Figure 3-51).

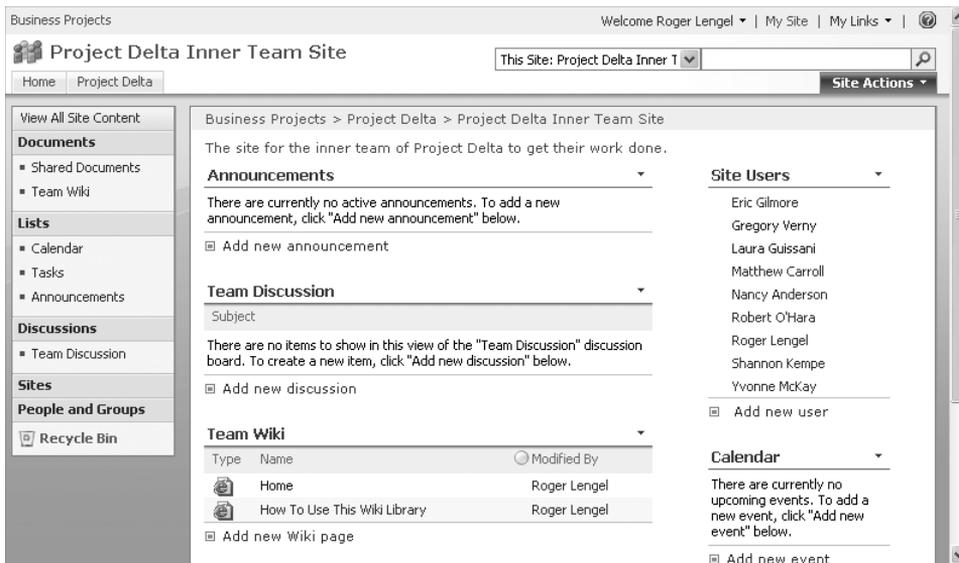


FIGURE 3-51 The Inner Team site now displays a list of site members.

## Step 7. Add a Team Blog

The final capability you need to add to the team site for the core project team is a blog. In SharePoint terms, a blog is a site, not a list or a library. Create a new site within the Delta Inner Team site, and choose Blog on the Sites and Workspaces page. Give the blog a name—something like Team Blog—type a description for the new blog, use the same permissions, link from the Quick Launch bar, and use the same top bar as the parent site (see Figure 3-52).

**Title and Description**  
Type a title and description for your new site. The title will be displayed on each page in the site.

Title:  
Team Blog

Description:  
A team blog for the Project Delta Inner Team

**Web Site Address**  
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.  
For example, <http://intranet.fourthcoffee.com/sites/projects/de.../sitename>

URL name:  
<http://intranet.fourthcoffee.com/sites/projects/de.../blog>

**Template Selection**

Select a template:

Collaboration Meetings Enterprise

- Team Site
- Blank Site
- Document Workspace
- Wiki Site
- Blog

**FIGURE 3-52** Add a team blog to the Inner Team site.

Click Create when you are done.

SharePoint creates your blog and you are taken to the default home page, much like you are with a SharePoint wiki page library or wiki site (see Figure 3-53).

Before leaving, create a little bit of structure in the blog in advance of other team members coming by. First, get rid of the three default categories—Category 1, Category 2, and Category 3—by clicking the Categories heading. Delete each of the three default items in turn by right-clicking the item's name and then clicking Delete Item (see Figure 3-54).



FIGURE 3-53 The default home page of a new blog

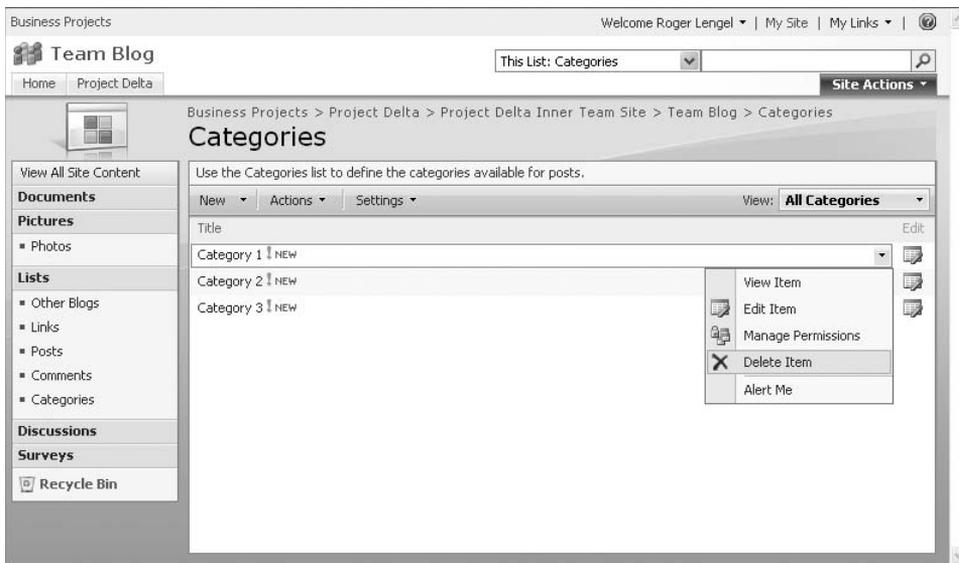
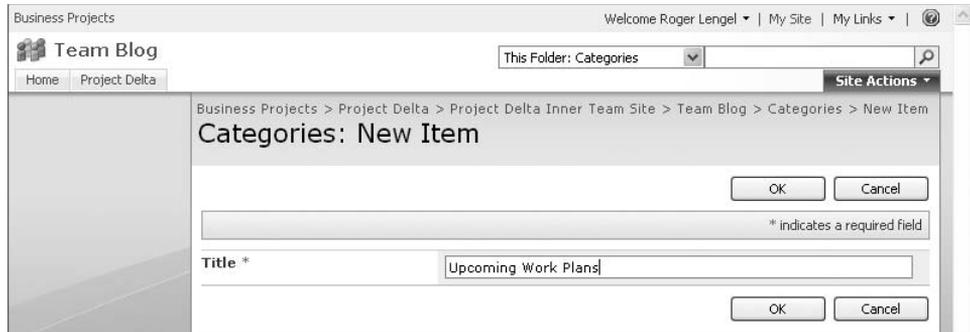


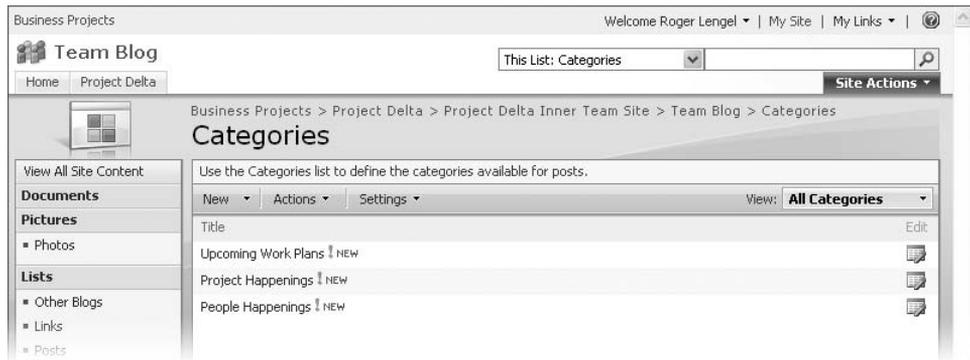
FIGURE 3-54 Delete the three default categories from your team blog.

Now add three categories that are better suited to the team blog for the purpose it will be used for: Upcoming Work Plans, Project Happenings, and People Happenings. Just click the New button to enter a new category name on the New Item page (see Figure 3-55).



**FIGURE 3-55** Add a new category to the team blog.

After you enter all three category names, you have a new list of categories for the blog (see Figure 3-56).



**FIGURE 3-56** The three new categories for the team blog

Click Team Blog in the breadcrumb trail at the top of the screen to get back to the blog home page. The breadcrumb trail is the sequential listing of pages that you have clicked through to get to this point in the site, and it provides quick access to clicking to an earlier place in the site.

The second change to make to the blog is to edit the default blog post. Open the default blog post by clicking its name—Welcome To Your Blog!—and then click the Edit button on the far right of the screen (see Figure 3-57).

As with editing a wiki page, you will be able to select the current text, delete it, and then write a more appropriate first blog post for the other team members to read when they first visit the team blog. Write something that welcomes the team members to the blog for the project, and explain that you will be talking to them more about using the blog soon.

Don't forget to edit the title, too, and add the post to the Project Happenings category. When you finish, click Publish (see Figure 3-58).

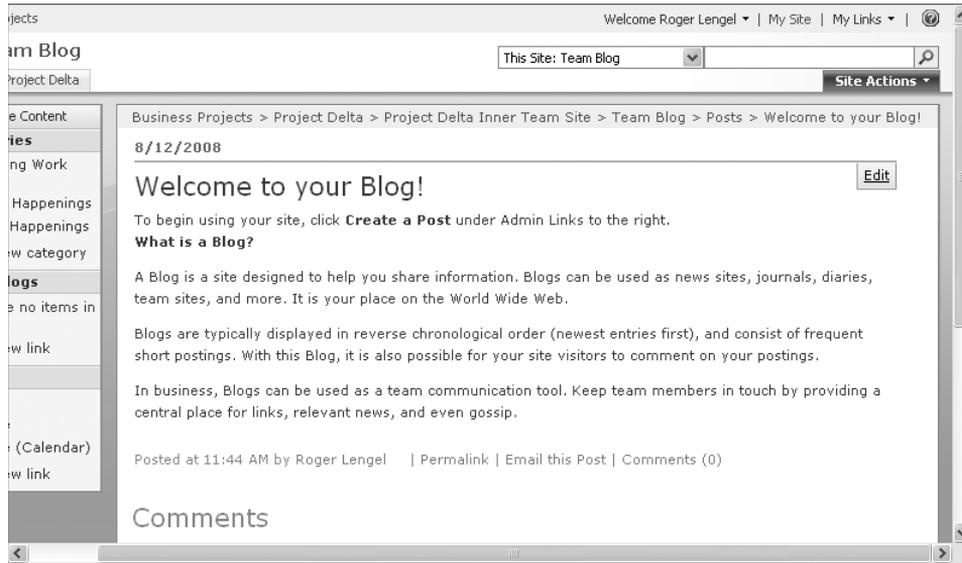


FIGURE 3-57 Edit the default blog post.

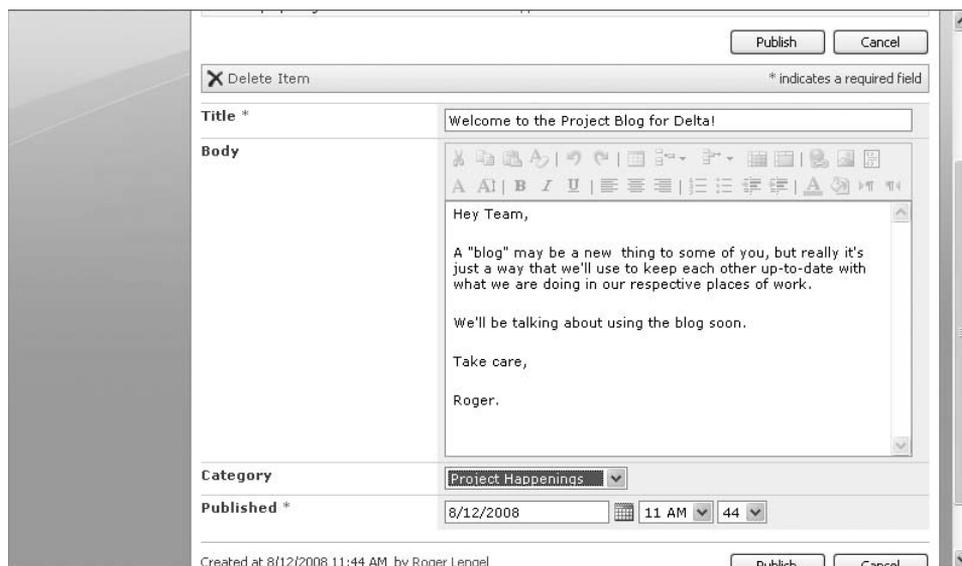


FIGURE 3-58 Write an initial blog post to welcome the team to the new team blog.

## And You're Done!

Congratulations! With the completion of these steps, the SharePoint site for the core team of Project Delta is ready to be used.

## ■ Do You Have to Do This for Every Project?

Do you have to go through this process—creating three nested sites, with different security groups and rearranging the Web Parts—for every project? Yes, you should. Any business project where you have a terms of reference document, a group of sponsors, and a nominated team should be done this way. But it's not onerous to set up, and indeed, after you are in the swing of managing projects in this way, whenever you work without this approach, you will feel lost. The normal things that you expect (the various constructs of SharePoint and the way of working with SharePoint) will not be there, and the way of working with others that you have become familiar with will be gone. Indeed, the entire setup can be done via a SharePoint template and very easily provisioned by IT for a new project.

There's another benefit to doing things in the same way for every project. You will get into a habitual way of working with SharePoint, and the technology will become an invisible part of your working style. Thus it won't get in the way and will just become "the way we do things around here." All of the different pieces will be where you expect them to be, and you won't have to go looking for where the team calendar is, or for where you should put a certain document, or where you should put a certain task. What is for one project is for all projects, and what is for one person is for everyone.



# Team, Meet SharePoint

## **IN THIS CHAPTER, YOU WILL**

- Gain a snapshot overview of how the different parts of the SharePoint team site will be used.
- Set up alerts to pull you back into the SharePoint site.
- Enter your context and contact details into SharePoint.
- Find the overlap in everyone's working day.
- Establish and document a virtual teamworking protocol.
- Start using the team blog.
- Learn how to work with SharePoint when offline.

**ROGER WAS PLEASED** with himself after he finished setting up the three SharePoint sites. The structure that he had created would give each of the main groups of people involved in the project a place to work and a place to see what was going on. For the moment, the main part of his work was completed, and it was time to get the team members involved in their new work place.

Roger pulled out his trusted piece of paper again, and found his favorite pen. "Now before we get started on Project Delta," he mused to himself, "there are some things that I, for one, want to know." And then putting pen to paper, he quickly wrote down:

- Who are these people?
- How are we going to work together?
- How will we each know when other people want us to do something?

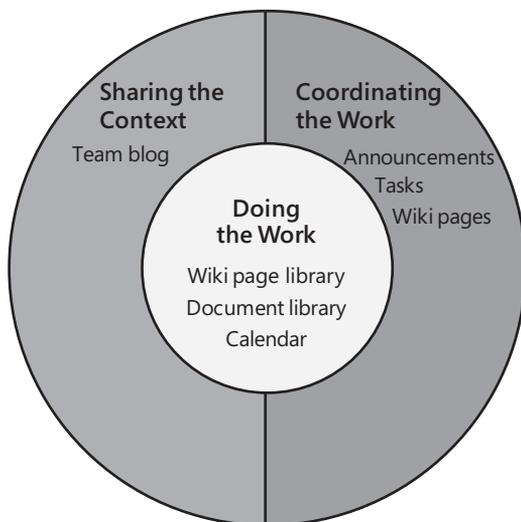
His writing was interrupted by the phone ringing, and when Gareth Chan's name flashed on the little screen, he quickly reached over and picked up the phone. With a great big smile in his voice he said, "Just the man I need to speak with!"

## ■ Welcome to Your New Team Home

The *Seamless Teamwork* approach is to embrace the capabilities of SharePoint to support both the doing of the team's work and the cultivation of the health and well-being of the team. The doing of the team's work is expressed through several SharePoint tools: a wiki page library, a document library, a discussion list, a calendar, a task list, and an announcements list. The health and well-being of the team is also cultivated through SharePoint tools, with the two key ones being the wiki page library and the team blog.

At the top-level, there are three parts that describe how the *Seamless Teamwork* approach works (see Figure 4-1):

- **Doing the Work.** The work of the team is done by using shared artifacts (in the wiki page library and the document library), with the team calendar used for coordinating in-person meetings.
- **Coordinating the Work.** The work of the team is coordinated by using the process part of the Team Wiki for describing a common working approach, the announcements list for team-level coordination, and the task list for individual-level coordination.
- **Sharing the Context.** The context of the team and its members is shared by using the team blog.



**FIGURE 4-1** *Seamless Teamwork* embraces SharePoint for doing the work, coordinating the work, and sharing the context of the work.

## ■ Knowing What's Going On

One of the challenges to teamwork with a SharePoint site is the simple matter of forgetting to check for new information and new action items on a regular basis. People on the team will write a draft document and post it into SharePoint, create a new meeting event, or update one of the existing wiki pages, but they should not have to tell everyone else what they have done. They should be able to trust that everyone else will either make it a regular habit of checking for new information in SharePoint, or that they have some way of being alerted to the changes that have been made.

The best approach is to have some way of being pulled back into the SharePoint team site when a relevant change is made, without having to go there and manually check for changes. For the first couple of days, team members may be diligent in checking the site, but there should be an automated way for SharePoint to alert team members that something has changed in their world.

Thankfully, there is.

### Getting Pulled Back into SharePoint

SharePoint offers a couple of key ways for alerting users about changes that have been made by other people within the SharePoint sites they belong to:

- E-mail notification, whereby an e-mail message is sent when something is added or changes
- RSS notification, whereby the same type of update is distributed by a file called an RSS feed, rather than by an e-mail notification

#### SEE ALSO

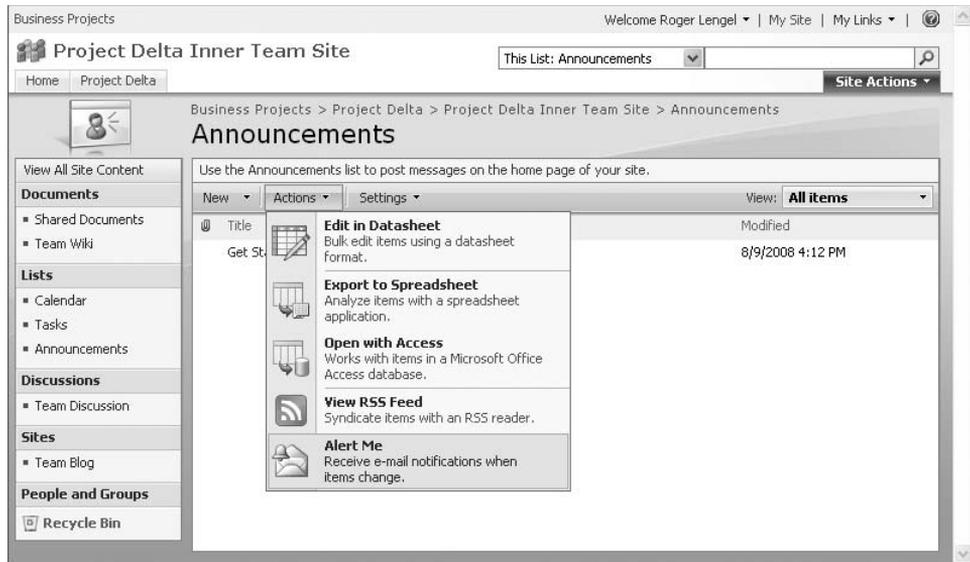
For an explanation about RSS, see the sidebar "What Is RSS?" later in this chapter.

Either alert type will work fine, but it is vital that each team member chooses one or the other or both.

## Setting Up E-Mail Alerts in SharePoint

E-mail alerts are set up for each list or library in SharePoint. Rather than having a global e-mail alert option, users are able to choose which lists or libraries they want to be notified about. The key list of interest for Roger and the team is the announcements list, because that will be the central place for coordinating the things that are happening in the project. To create an e-mail alert for the announcements list, Roger first opens the announcements list, either by clicking Announcements in the Lists area on the Quick Launch bar, or by clicking Announcements on the home page of the Project Delta Inner Team site.

After the Announcements list opens, click Actions, and then click Alert Me to set up an e-mail notification (see Figure 4-2).



**FIGURE 4-2** Click Alert Me to set up an e-mail alert for a list.

Roger can create e-mail notifications for himself and for other people on the team from the New Alert page. He first gives the alert a descriptive name, and then enters or selects the list of people on the team in the Send Alerts To box (see Figure 4-3).

The lower half of the New Alert page provides options about the alert itself. For announcements, this is things like the type of change that should trigger an alert, specific criteria for the alert, and the timing of the alert. Because the key objective is to let everyone on the team know as soon as anything changes on the Announcements list, Roger goes for All Changes, Anything Changes, and Send E-Mail Immediately (see Figure 4-4).

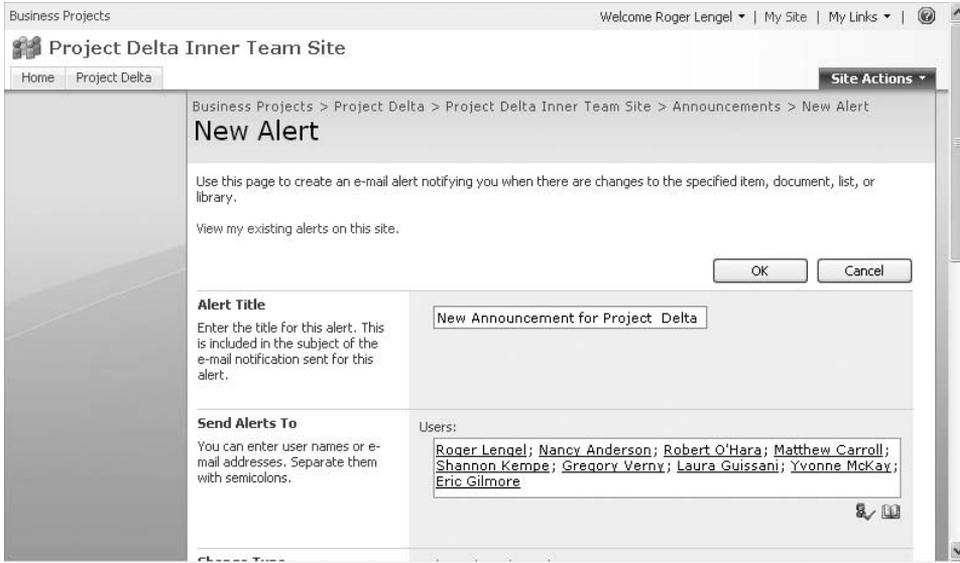


FIGURE 4-3 Give the alert a name, and enter the people to receive the alert.

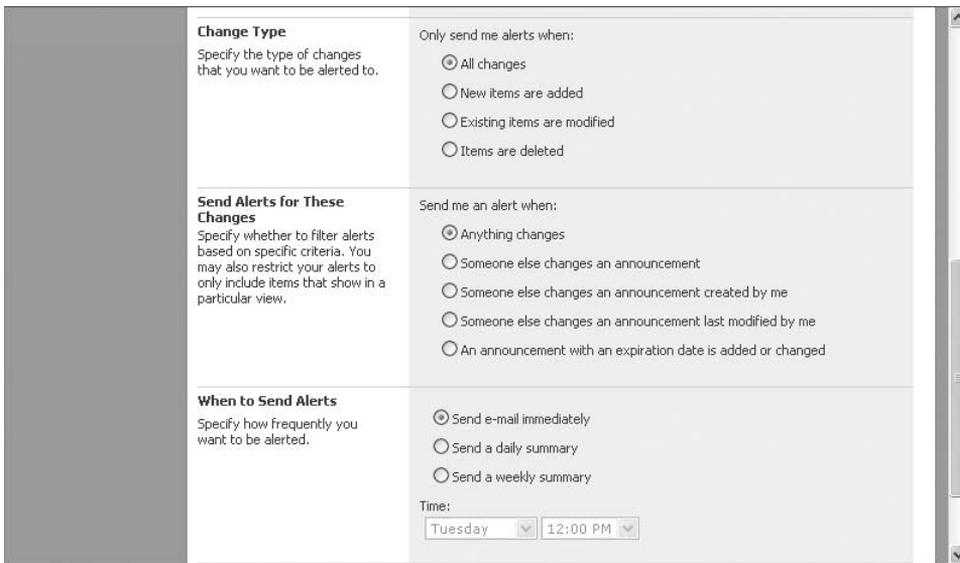
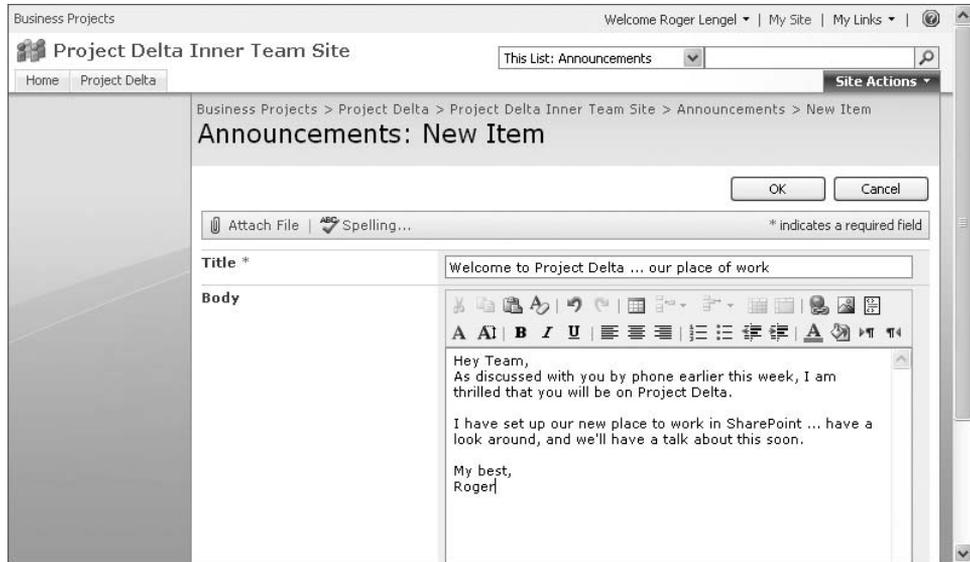


FIGURE 4-4 Set the options for the alert.

When done, he presses OK at the bottom of the page, and the alert is created.

Roger's next action is to create the first announcement in the list, welcoming everyone to the project and letting them know that SharePoint is ready for them to use. To create the first announcement, he clicks Add New Announcement from the main page of the Project Delta Inner Team site (see Figure 4-5).

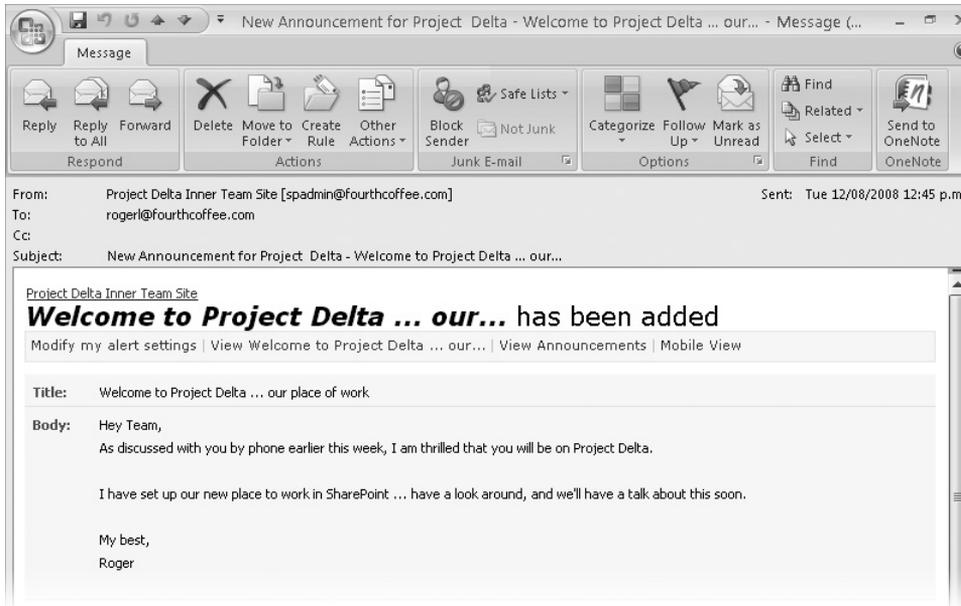


**FIGURE 4-5** Add the first announcement welcoming the team to the Inner Team site.

After Roger clicks OK on the Announcements form, it is saved to the Announcements list and an e-mail alert is sent to each of the team members.

## Receiving an E-Mail Alert

When the alert that Roger has just configured is triggered by activity in the Announcements list, a message will be created and sent out to Roger (and anyone else with the same alert). The subject line of the message says that it is an alert from a specific SharePoint site, and the message provides a link for pulling the user back into SharePoint to view the change (see Figure 4-6).



**FIGURE 4-6** SharePoint distributes alerts in e-mail messages so that people are advised quickly of relevant changes.

## Deleting or Modifying an E-Mail Alert

Although Roger has created the alert for everyone on the team, the team members individually can delete or modify the alert if they don't want to receive it every time something changes. They can see their own personal list of alerts by first clicking My Settings, which they can access from anywhere in a given SharePoint site by clicking on their name in the upper-right corner of the page (see Figure 4-7).

Then click My Alerts on the User Information page to review your active alerts for that specific SharePoint site (see Figure 4-8).

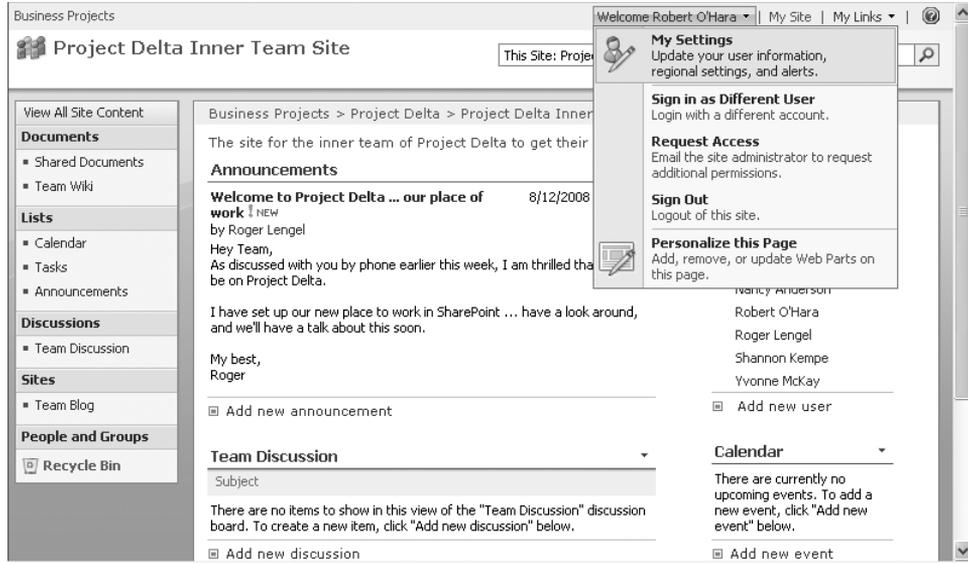


FIGURE 4-7 Open My Settings to review your alerts for a SharePoint site.

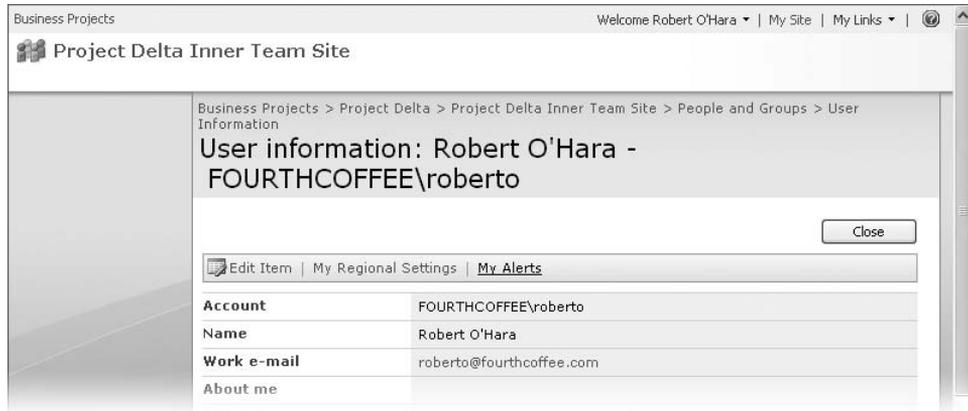


FIGURE 4-8 Access the Alerts page through your My Settings page.

The My Alerts On This Site page lists all of your alerts for the current site, organized by frequency of notification—immediate, daily, and weekly. Because only one notification has been set up for Robert O'Hara, he sees only the New Announcement For Project Delta alert. He can select it and delete it, or he can open it to make changes (see Figure 4-9).

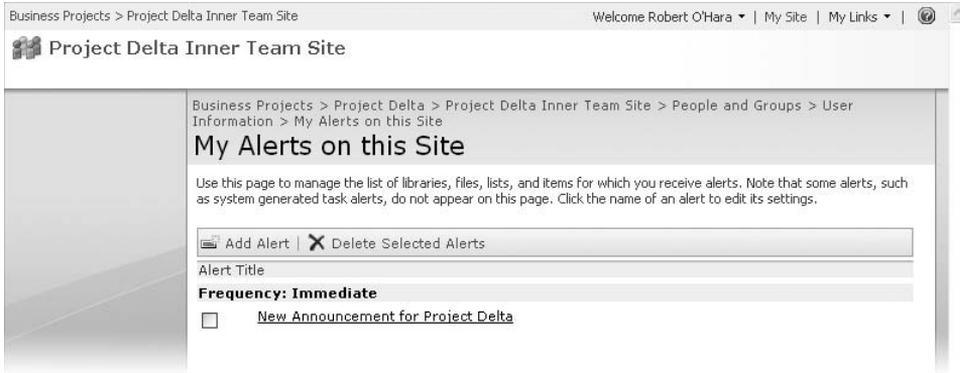


FIGURE 4-9 Individuals can review their alerts for a SharePoint site.

Robert opens the alert, and decides that for his requirements, an alert only when New Items Are Added is the way to go, so he selects that and then clicks OK (see Figure 4-10).

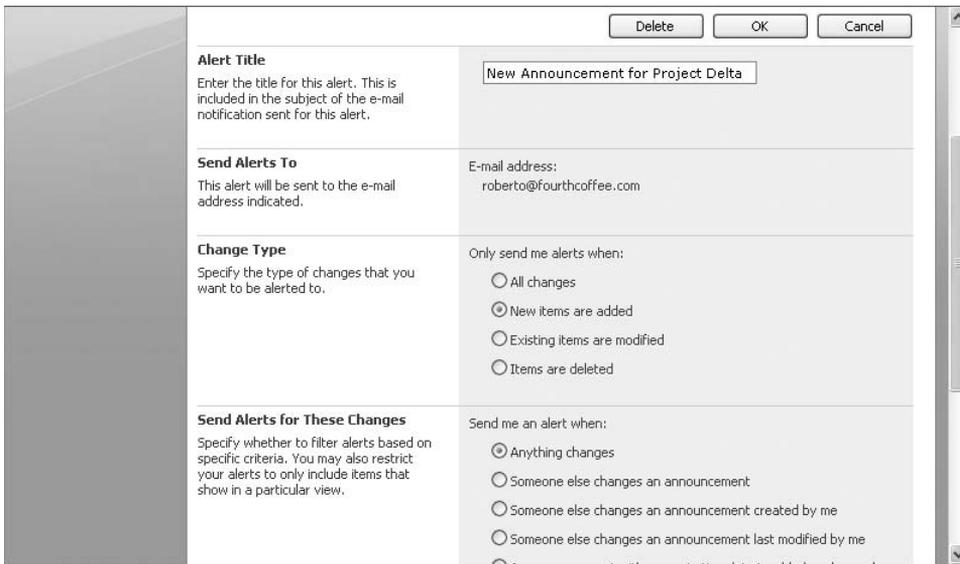


FIGURE 4-10 Users can change or delete alerts.

## MANAGING E-MAIL ALERTS IN SHAREPOINT

Let's have a deeper discussion about setting up e-mail alerts in a SharePoint team site. It is important to strike a balance between creating more discordant e-mail noise for yourself with too many alerts of the wrong kind, and being swiftly informed of new happenings by e-mail that make your life and work easier. SharePoint offers an e-mail alerting capability, but how you use it will determine whether it has positive or negative effects for you.

The first rule in creating e-mail alerts is selectivity. Don't do it for everything. When you are waiting for a certain document to be added to SharePoint, set up an alert (New Items Are Added, then Send E-mail Immediately). After the document has been added, delete the alert. When you have asked a team member to review a document for you, set up an alert (When Existing Items Are Modified Then Send E-mail Immediately). After your team member has reviewed the document for you, get rid of the alert. Even if the alert is only current for three hours in the system, you haven't had to worry about or think about it during that three-hour period, but were able to get on with your other work knowing that you would be told as soon as something happened.

The second rule is to create alerts that align with your current areas of focus. If working on a project like Project Delta is a major part of your time and energy investment at the moment, create a set of alerts so that you know what's going on without having to look. These alerts act as a personal butler, announcing changes that you may want to know about, and thus allowing you to at least have been told. It is totally within your power to do nothing about the alerts, but you have had that choice with an investment of three to five seconds to scan an alert, rather than a couple of minutes to head off to SharePoint and check to see if anything has changed.

The third rule is to take an "easy-come, easy-go" approach. It is very easy to create a new alert request in a SharePoint site, and you should create one whenever it makes sense within your work. Hey, create one just for the fun of it ... and then see if the alert is working for you and is proving to be helpful in your work. If you find yourself checking a folder for new things, or just to see what's changed, you need to create an alert for yourself, most likely of the Send A Daily Summary variety. That's the easy-come half. The easy-go part is that when you find an alert is no longer helpful, get rid of it. Delete it. And do so without any regret or concern. If you made a mistake in deleting it, and find yourself missing out on key things because you don't have the alert any more, add it back. But don't keep alerts hanging around that have outlived their usefulness and are proving to be annoying.

The fourth rule is to automatically shift your alerts from SharePoint into a special "SharePoint Alerts" folder in Outlook. Create an e-mail rule in Outlook to automatically move all of your alerts out of your Inbox into a separate folder of SharePoint project alerts. This means that the alerts are not mixed in with all of your other messages, causing even further e-mail overwhelm. This way, you can see quickly and easily know what's changed in the various projects you are involved with. Extending this idea for even greater benefit is to create a Search Folder in Outlook 2007 to highlight the particularly urgent and immediate-attention-required alerts from SharePoint.

The fifth trick is to choose an e-mail Alert Title that really helps you in your work. When you look at your list of alerts in a specific SharePoint site, they are categorized by frequency (immediate, daily, and weekly), and then only the Alert Title shows. Hence, if you have 10 to 20 alerts set up, the only piece of information you are given to help differentiate between alerts is the title. So make it a good title. For example, why do I have an alert named *Tasks* (immediate) and one named *Daily Summary of Michael's Tasks* (daily)? What's the difference between the two? What warrants me having two? Unless I click the title and review the alert information, I have no way of knowing from the title what it does and where it works within the site. So I need to make the title more descriptive.

Having clicked into both of these, there is a good reason there are two. The *Tasks* alert is to tell me whenever I get a new task assigned to me; I want to see what people are telling me to do ASAP! So the better title for it is *A New Task Is Assigned To Michael*. But what happens if an existing task that was originally assigned to someone else is suddenly re-assigned to me? The way that I have created my alert means that I won't see it. So I really need to request an alert for "All Changes" when A Task Is Assigned To Me. Then I will get both the new ones and the changed ones. And as a consequence, the title of the alert should be written as *A Task Is Assigned to Michael*.

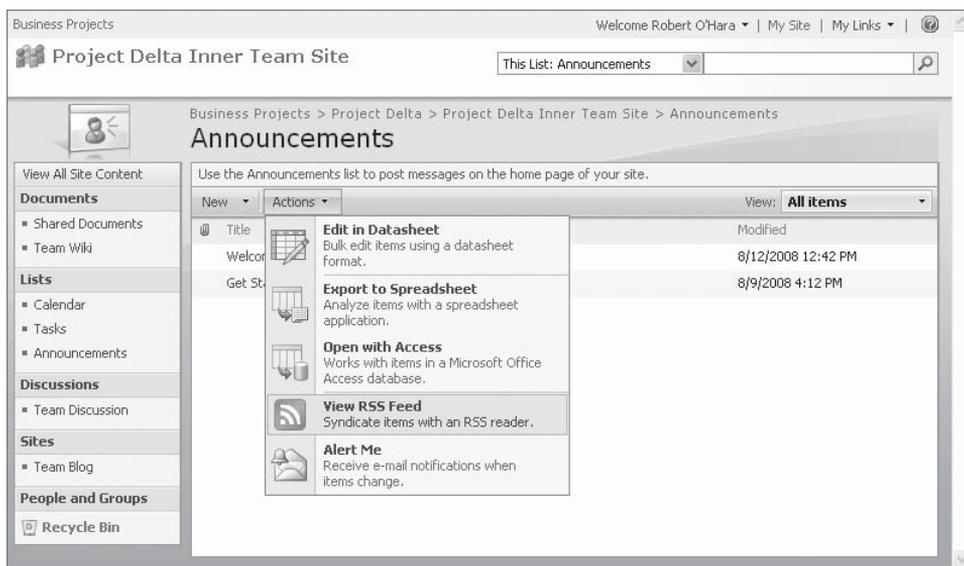
## Setting Up RSS Alerts in SharePoint

The alternative way of being pulled back into the SharePoint team site is for users to create an RSS alert for themselves. This means that e-mail alerts are not being sent, but rather they are told about changes through a relatively new technology called RSS.

## WHAT IS RSS?

RSS stands for “Really Simple Syndication” (and a couple of other variants), but the essential idea is that every time a Web site such as a SharePoint team site changes, a list of changes is automatically created and maintained as a special page on the Web server. When an RSS reader on the user’s computer—such as Microsoft Office Outlook 2007—requests the latest copy of the RSS page, all of those changes appear within an Outlook RSS Feeds folder. Outlook 2007 displays the RSS page as a list of messages, one for each change on the master Web site.

To create an RSS alert for a list or library, for example the Announcements list, open the list (as you did when creating the e-mail alert), click Actions, and then click View RSS Feed (see Figure 4-11).



**FIGURE 4-11** Click to view the RSS feed for a list.

This opens a page for the RSS feed, and asks you to confirm that you want the RSS feed for the Announcements list. Click the [Subscribe To This RSS Feed](#) link (see Figure 4-12),

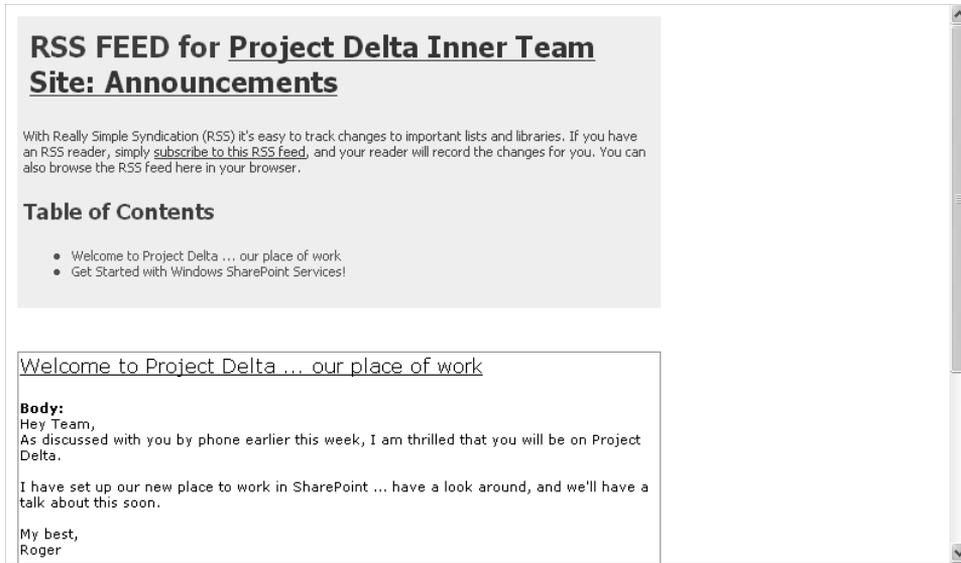


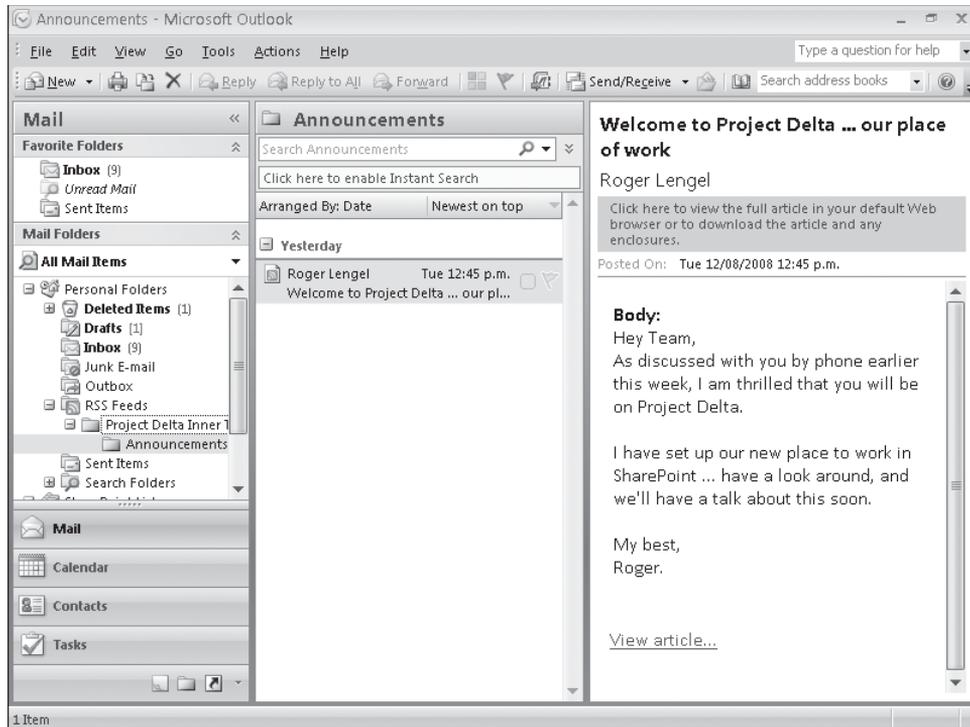
FIGURE 4-12 The RSS feed is shown in Internet Explorer.

If Outlook 2007 is set up as your RSS reader, you will be prompted to add the feed to Outlook. Click Yes in the dialog box (see Figure 4-13).



FIGURE 4-13 Outlook asks you to confirm your subscription to the RSS feed.

Because you may end up having lots of RSS feeds for different SharePoint sites, and even multiple feeds for your Inner Team site, create a project-specific folder to store your Inner Team feeds, and then move the feed you just added into that folder (see Figure 4-14).



**FIGURE 4-14** Use Outlook folders to group similar RSS feeds.

This means that you can group all of your feeds related to specific projects together, for an at-a-glance view of what's going on.

Finally, note that other people cannot create RSS alerts for you. Only you can do it, giving you total control over what you receive RSS alerts for. And when you have had enough of being alerted by RSS, you just delete the RSS alert from Outlook 2007 and it will no longer pull it in for you. So you have total control, and only get what RSS alerts you want to get.

## RSS IN WINDOWS VISTA

In Windows Vista, RSS feeds are handled by the operating system, and then shared among RSS readers. That's a major difference from earlier versions of Windows, where RSS is handled as an application issue—for example, RSS is handled by Outlook 2007 in Windows XP, but in Windows Vista, RSS is handled by the operating system, and one of the places where the feed can be displayed is in Outlook 2007.

## ■ Entering Your Details in SharePoint

When you work with new people on a team, you generally know so little about them at the beginning of the project. You are told some things, but you have to find out everything else for yourself. It would be really helpful if you had an approach to learn more about the other people who you are working with as early as possible in the project, so that you can more fully make use of their skills, expertise, and interests. Saying with a groan halfway through a project, “I didn’t know that you were interested in that!” signals a great loss of opportunity.

Learning about other people on a team is easier when you work with them in person. When you can see them working at their desk, when you can notice the books on their shelves and the magazines they subscribe to, you pick up a lot of this insight in an implicit way. When the others who you work with do not work in the same place as you, your job is more difficult.

But there is hope.

In this section we are going to look into using SharePoint to capture contextual and contact details about each team member.

### What Do We Want to Know?

Roger’s project—and yours, too—involves working with other people whom have particular areas of expertise and interest. Teamwork is more effective when people know more than just the task information required to get the joint work completed. It’s helpful to know who the other people really are, what they are interested in, where their passions in life lie ... so that the interaction can be richer and extend beyond a pure work focus, and more than that, so that the work can be structured to call on people’s unique contributions and insights.

There are at least five key areas where it is helpful to have insight into the other people you work with:

- **Contact Details.** When you need to contact someone else on the team, what are the range of options that are open and available to you? E-mail address, instant messaging address on the different services, phone number, mobile number ... all of these are different ways of getting in contact with the other people on your team. In addition, if you are working on a team with people from other organizations, knowing that information is helpful to give context to conversations and the positions that people take in discussions.
- **Home Location.** Where are they based, as in the geographical location they call “home”? When you are working with team members located around the world, the opportunity for joint, real-time work becomes less and less as more and more time zones are crossed. When some team members really do live on the other side

of the world, the overlap in working hours is nil, and so someone has to take an out-of-work meeting appointment when you have to work together.

- **Current Location.** With the travel that is often a part of regular business life, people aren't always at their usual place of work. So where are they now, and where do they expect to be in the coming days?
- **Skills and Expertise.** What specific areas of skills and expertise does each person on the team have? What do they bring to the team for the benefit of all? It's good to be clear about what people see as their areas of strength, so maximum use can be made of these.
- **Passions in Life.** What are people really interested in and passionate about? What do they fill their out-of-work time with? Many people have started writing and sharing about such things on their personal blog.

## Filling Out Your My Settings Page

If you want to know this information about other people, then the place to start is with yourself. You need to share as much as you feel comfortable sharing, so that others can learn about you. From within the Project Delta Inner Team SharePoint site—or actually anywhere within SharePoint—click your name at the top of the page, and then click My Settings from the list. As we have already seen, this opens your User Information form in SharePoint. There are two types of information on this form:

- **Information that is intended for use by the system.** This is the data that SharePoint needs to know about you for granting access to SharePoint sites. Your IT department will manage this, and you won't be able to change it. This is primarily the Account field at the top.
- **Information that is designed for other people to see, understand, and use.** This is everything else on the form, including your name, e-mail address, the About Me field, and the rest of the fields. This information is displayed on the User Information form, but is maintained in two other places—your My Site and in Active Directory.

To update and revise what is noted about you, click over to your My Site and edit the details stored in the My Profile part of My Site. We talked about this in Chapter 2, “Managing the Project and Finding a Team,” for the project leader, and now that same information should be shared with everyone on the team.

Be sure to upload a picture! When you work with people in person, you don't wear a black mask so they can't see what you look like. Find a picture you like, and upload it. It really helps—for some reason that is hard to explain—to have some visualization of what the other people you are dealing with actually look like.

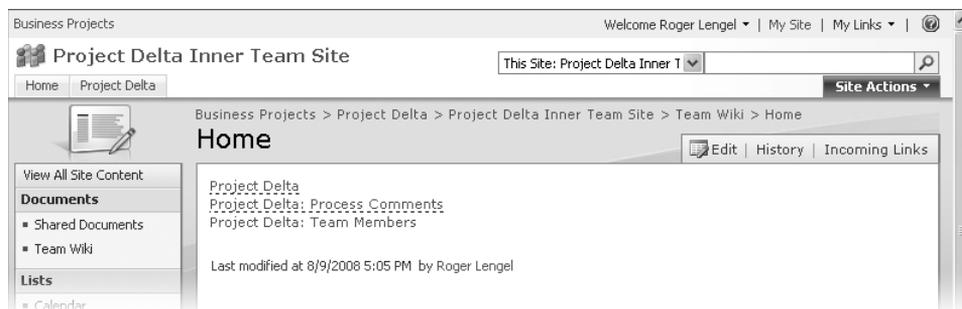
A couple of other best practices and ideas to consider embracing:

- The picture of you will be resized to a fairly small scale. If there are other good photos of you that you are willing to share, include a link to them in the About Me field.
- If you write a blog outside of work, include the link. If it covers some sensitive areas that you are not sure your colleagues will appreciate, either leave it out or include a warning. Tell people what to expect, so if they do go there, they won't die of shock.
- The information that you enter here is available everywhere across SharePoint—all of the sites that you are involved in use this information and will display it. If there are project-specific things that you want to say, don't put it here. Use the wiki—which we'll talk about soon.
- If you have a Web calendar that shows where you are going to be for work in the coming weeks and months, include the link in the About Me section.
- Your My Site page includes a lot of information about you and your work. Include a link to that.

## What About Project-Specific Information?

Because the user information that you enter about yourself is shown everywhere in SharePoint, you will need to exercise some judgment over what specifically you want everyone to see. And remember too that your My Site page includes a lot of good information about you and your work. If there are specific disclosures that you want to make specifically to everyone else in the team, do this in the SharePoint wiki in the Project Delta Inner Team site.

Head over to the Team Wiki, and click the Project Delta: Team Members link that Roger set up in Chapter 3, "Setting Up SharePoint" (see Figure 4-15).

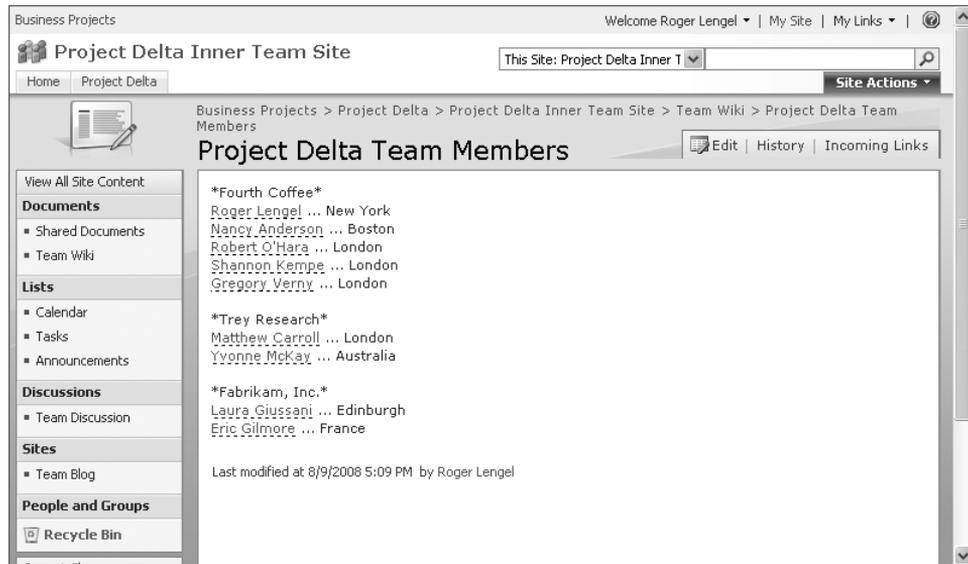


**FIGURE 4-15** Open the Project Delta: Team Members page from the Team Wiki home page.

If that page has not been created yet, a blank page will open (actually a dashed line under any page name signifies that the page has not been created), otherwise the current version of the page will open for editing.

- If your name is on the list, click it and add some more details about yourself.
- If your name isn't on the list, edit the Team Members page. Create a new page for yourself using the SharePoint wiki markup of double square brackets before and after a word or phrase to signify a new page, save the page, and then click your new link and make notes.

For Project Delta members, Roger has already created the structure of the page, and has even noted the organizations that each team member works for (see Figure 4-16).



**FIGURE 4-16** The Team Members page for the project

To add details about themselves, team members only have to click into their own wiki page, add any project-specific information they want to add, and then click Create (see Figure 4-17).

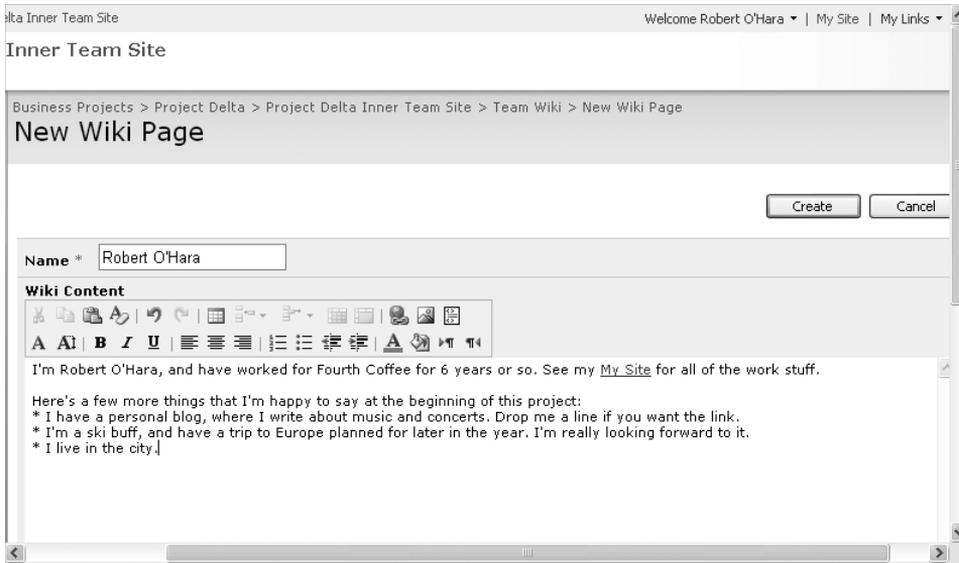


FIGURE 4-17 Write project-specific information about yourself on your wiki page.

## Discovering Common Working Hours by Using the Team Wiki

When you work with people across multiple time zones, it is a challenge to remember the right time in all of the different places. You may be able to remember two or three different places and get it right most of the time, but as the number of time zones increase along with the number of team members, it gets more and more likely that mistakes will be made. You can use SharePoint to help with time zone coordination, but more than that, you can use SharePoint to make it clear what overlap exists between standard working hours in the various places that people work from.

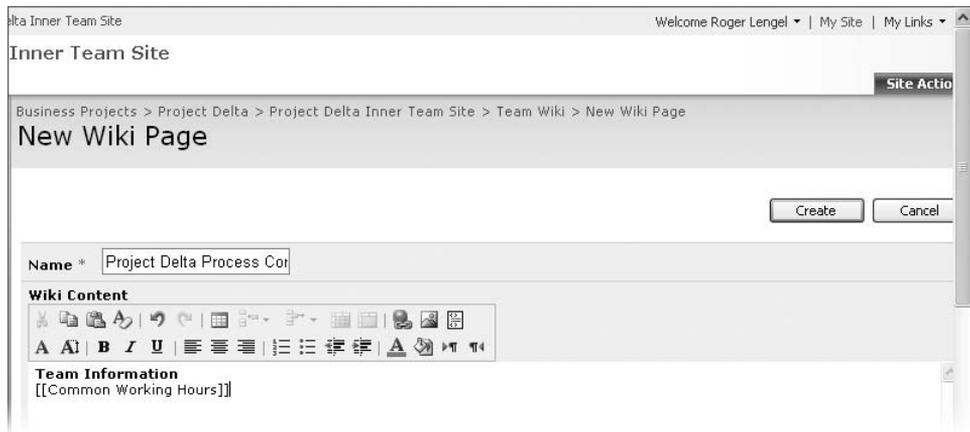
One of Roger's first requests to everyone on the team is to go into the Project Delta wiki, open the page named Common Working Hours that he has just created, and fill out the column of working hours during which each person will generally be available. The trick to make this work, however, is for everyone to enter the times against a common time standard, or in other words, a time list that is time zone friendly. When Roger on the East Coast looks at the page, he will be able to see which other members of the team are available for real-time interaction at 4 P.M. his time. The purpose of doing this is to make it evident to everyone on the team when others are generally available for work; of course, emergencies are one thing, but regular working hours are another, and as much

as possible, team members need to show respect to each other by keeping requests for real time meetings by phone or IM within the bounds of the identified common working hours page.

It is better to create this as a wiki page rather than as a Microsoft Office Excel 2007 worksheet, for two reasons. First, it is faster to edit the wiki page than to open and edit an Excel worksheet. Second, by doing it on the wiki, people can create a browser link to the actual page and the information on the page, rather than having to download and open the latest edition of an actual document. So it's faster and easier to use the wiki.

## Creating the Common Working Hours Page

Roger goes into the Project Delta wiki, clicks into the Project Delta Process Comments page, and creates a heading named *Team Information*. (Using the rich text editing control, Roger can type the text **Team Information**, select it, and click the Bold button). Directly under that, he types `[[Common Working Hours]]`, which tells SharePoint that he wants to create a new page named *Common Working Hours*. Within SharePoint, the "[[" and "]" around a word or phrase are code tags that tell SharePoint to create a linked page (see Figure 4-18).



**FIGURE 4-18** Create a linked page in the SharePoint wiki.

When Roger saves the page, a link is created with the words *Common Working Hours* highlighted. This means that he has entered the information correctly, and can now click that link to create the page. Roger does so, and gets another blank page in the SharePoint wiki.

He looks at the list of nine names on the team, and notes the place that each comes from and works from. He creates a table in the SharePoint wiki page, with nine columns and 26 rows. He clicks the Insert New Table button to create the new table (see Figure 4-19).

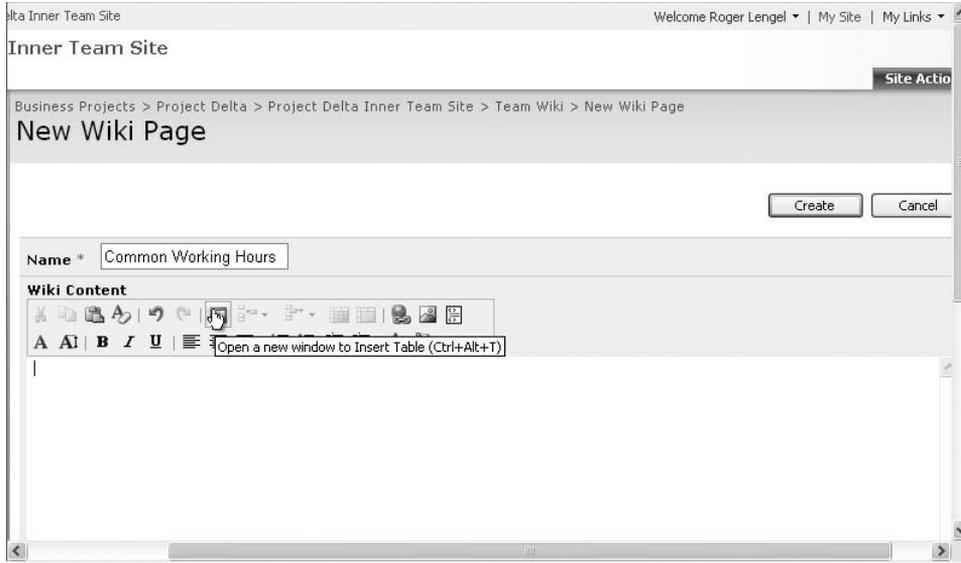


FIGURE 4-19 Add a table to the wiki page.

SharePoint opens a dialog box to ask Roger to specify the number of columns and rows in the table (see Figure 4-20).

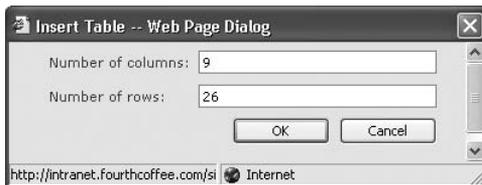


FIGURE 4-20 Specify the number of columns and rows in the table.

Across the first row, Roger enters **London** in columns 1-4, **Edinburgh** in column 5, **France** in column 6, **Boston** in column 7, **New York** in column 8, and finally **Australia** in column 9. He has laid it out this way to show the general flow of a working day for the team ... who starts first, and who works latest.

In the second row, he enters the names for the nine team members, based on where they live and work. From left to right, that's **Robert**, **Shannon**, **Matthew**, **Gregory**, **Laura**, **Eric**, **Nancy**, **Roger**, and finally **Yvonne** (see Figure 4-21).

He then enters the working hours that he can generally do. It is important to note that these times are a general statement of Roger's working reality, and don't take into consideration other meetings, scheduled travel, or other things. It's just what his normal

working day looks like, and what he is willing to do at a pinch to ensure he can actually talk with others on the team (see Figure 4-22).

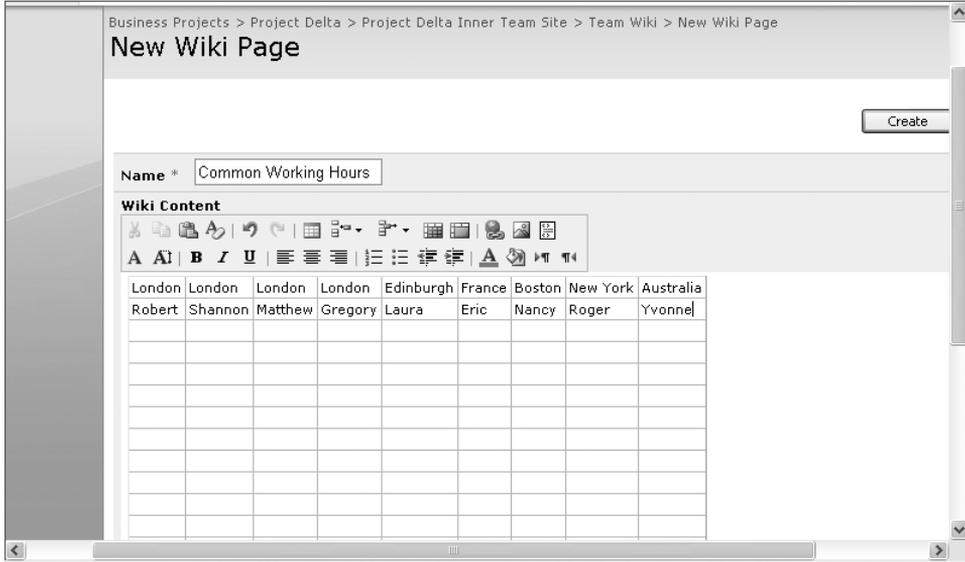


FIGURE 4-21 Set out the locations of the team members.

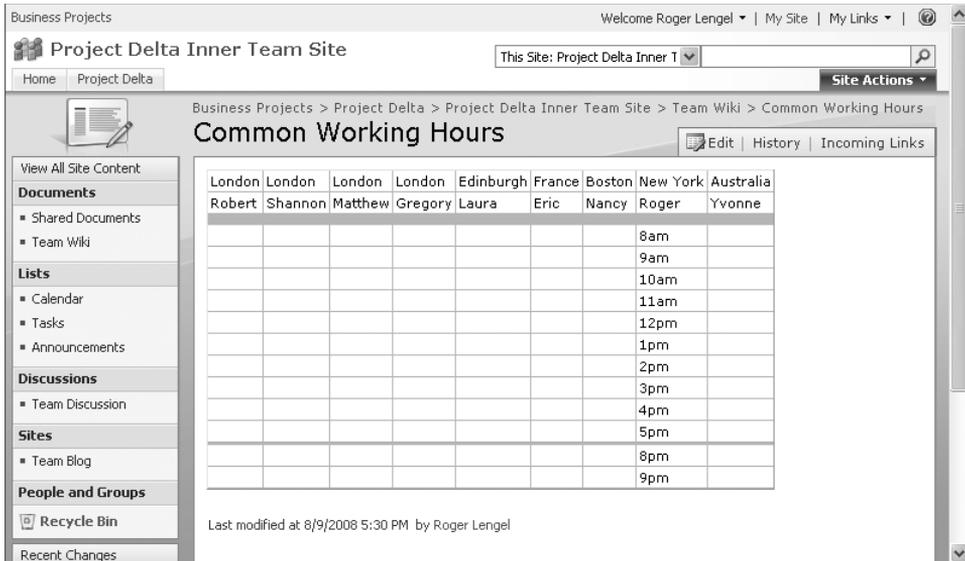
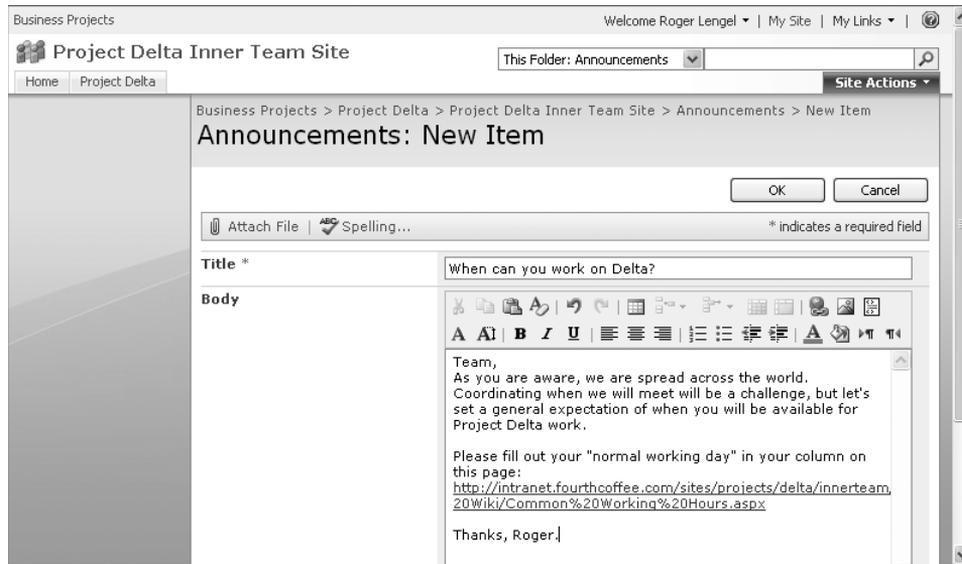


FIGURE 4-22 Roger sets out the times that he is available to work on Project Delta.

Thus, when looking at Roger's working hours, we see that he works 8–6 P.M. each day, and is also available between 8 and 10 P.M.

After Roger has filled out his general day, he creates a new announcement in the Announcements list, telling the team about what he has done, and requesting that they do the same (see Figure 4-23).



**FIGURE 4-23** Create an announcement to request team members to fill in their times.

Because all the team members have either an e-mail alert or an RSS subscription to the Announcements list, Roger knows that they will see his announcement and the request within a few hours. Once everyone has filled in their columns, he will be able to see about setting up the meeting times when he can view the overlapping working hours; and if there are no times that are self-evident, then he can consult with a couple of team members to see if he can make it work.

Taking this approach to figuring out when people will generally be available to work means that people can work on this project at times that are best for them. If someone wants to sleep all day and work all night, then it doesn't really matter ... but what does matter is that such a decision is made clear so that others can see when they can rely on that team member to be available for conversation and interaction.

Once again, it doesn't really matter when people are available, just that everyone knows when others are generally available so they get a sense of when things will be done.

Roger is delighted to note the next day that the page is all filled out (see Figure 4-24).

	London	London	London	London	Edinburgh	France	Boston	New York	Australia
	Robert	Shannon	Matthew	Gregory	Laura	Eric	Nancy	Roger	Yvonne
6am									
7am									
8am			8am						
9am	9am	9am	9am						
10am	10am	10am	10am			11am			
11am	11am				11am	12pm			
12pm	12pm			12pm	12pm	1pm			
1pm				1pm		2pm	8am	8am	
2pm				2pm		3pm	9am	9am	
3pm	3pm			3pm		4pm	10am	10am	
4pm	4pm			4pm			11am	11am	
	5pm			5pm			12pm	12pm	
	6pm	6pm		6pm			1pm	1pm	
		7pm		7pm			2pm	2pm	4am
		8pm					3pm	3pm	5am
		9pm					10pm	4pm	6am

**FIGURE 4-24** Everyone has contributed to the Common Working Hours page.

It is, however, immediately clear that there are no overlapping times for everyone on the team, so meetings that require the attendance of everyone will need to be carefully planned.

## ■ Establishing a Teamworking Protocol

At the beginning of working with other people on a shared project, team members need to agree on the general approach to how they will work together, particularly when technology such as SharePoint is involved. Because everyone not in the same room is invisible, a shared mental picture is needed by everyone to know what has been planned to happen. “How does what I am working on by myself here relate to what Yvonne is doing in Australia and what Robert is working on in London?”

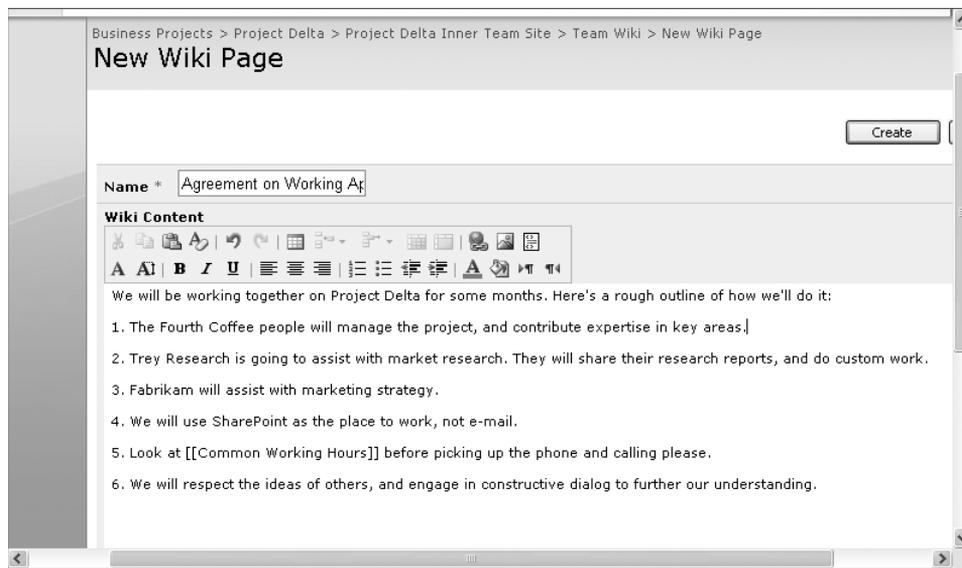
At this stage of the team’s work, a few broad principles and agreements are in order. For example, it is very helpful to have shared and common expectations about the following:

- How often people will respond to announcements posted in the SharePoint announcements list. Is a response within a week sufficient, or is something faster expected?
- How people will react if they do not understand something that another person says. Do they push ahead on their understanding, or do they go back to the other person?

- How people will share the contextual information about what is going on for them.
- That it is expected—and absolutely beneficial—that people have disagreements and differences of opinions about key matters in the project. If everyone thinks the same, a team will not be necessary. However, the key is that we will not allow disagreements to derail the progress of the project, because we agree to listen carefully and resolve our disagreements through candid dialogue and debate. When we can't do this by ourselves, we agree that after making our case to the wider team, we will abide by the decision of the wider team.

Making the point of agreeing with these principles upfront is very helpful to ensuring that the difficulties of working remotely do not overshadow the work of the team, and ruin it for everyone.

The best way to start the agreement toward a shared way of working is for the team leader to make an initial statement of approach, using the SharePoint Team Wiki. This should be on a page linked from the Project Delta Process Comments page, and should be named **Agreement on Working Approach** (see Figure 4-25).



**FIGURE 4-25** Use the wiki to describe the common working approach.

After the initial statement has been made, the team leader should create an announcement linking back to the page, asking the other members on the team to read it over and make any suggestions or recommendations that make sense. These can be made directly on the page in the wiki.

## ■ Giving Others Insight into What's Happening

When you work with other people in person, you get to see what is going on in their work and life. And that means everything that is going on, not just the project work that you are jointly involved with. For example:

- The meetings they attend and the issues that they get particularly fired up about, in good and bad ways!
- The people who come by to speak with them, both about current and future work. And sometimes you even get to hear the totality of the conversation, because while you are working away at your desk, they are standing just over there and having a good-old talk.
- The magazines and books they're reading—you can see them on their desk, or they discuss them at morning break.
- The trips that they have planned, for business and pleasure, because you hear them talking about upcoming travel and see the dates marked on their calendar.

When you share a work life with others, you get all of this extra information as a natural consequence. It is an implicit thing that happens, rather than something that you need to search out. But it often helps you understand better the people who you are working with, and the range of skills that they have to offer.

When you work with people who are not in the same place as you, the sharing of this contextual information is much more of a challenge. It is actually one of the hardest things to get done. It's not hard because it is difficult, but rather is hard because your contextual information is so self-evident to you because you are in the midst of it. It's almost invisible to you, and you can't imagine that others could be interested in it. Resolving the sharing of contextual information is completely within the control of team members, and SharePoint provides a great way to do it: the team blog.

### Writing on the Team Blog

The key to making the team blog work is that everyone on the team should regularly post an update on their work. Everyone should post at least once a week, and many people on the team should post every day or every other day. Here are some topics that team members should write about on a frequent basis.

The first topic is what's happening with the project at your location. For example, the scraps of information about who came to the office to discuss the project today may seem like "scraps" to you, but can be very interesting to others. Ditto the project meetings that

you were a part of, and how the various pieces of the work that you are responsible for are going. Each day, or after each meeting that has relevance to the project, post a short summation of who attended and what was discussed, and what decisions and next actions were determined.

A second topic is a summary of any in-person meetings you had with others on the core project team. Talking about in-person meetings that you were able to arrange gives others on the team something of a sense that they were there too and that they therefore didn't miss out. Writing out in short terms or in long detail about the sorts of topics that you discussed during the meeting helps other people form a sense of how the project is going for you, and what you are currently doing.

A third topic is your work plans for the coming day or week. It's really helpful to others to have a sense of the current work activities that you are undertaking, because it helps them to know what to expect from you in relation to their work and the overall progress of the project. If your list of work activities changes daily, then make a three-line or four-line blog post updating everyone on the team about what you will be working on today. If a week is a better planning horizon for you, make a blog post once a week about your plans for the next week. If it's the same as last week, make another post anyway, noting what you did achieve and what specifically you will be doing this week.

A fourth topic is any upcoming vacation time that you have planned, as well as any upcoming public holidays that happen in your country. With respect to the vacation time, knowing that others on the team will be away "next week" or "in a fortnight" helps everyone else set expectations about what to expect from you. It also sends the signal that if they have things they want to discuss with you, that they should talk to you sooner rather than later.

After you get to know the other people on the team a bit better, you may even write about the movies you watched out of work time, because you know that others on the team like the same movies that you do. Or they like the same sports team. Or whatever—the point is that it celebrates the commonalities that do exist and goes some way toward covering over the huge number of differences that team members who are not together have to overcome.

## Letting Everyone Post Without Approval

When a new blog site is added to a team site in SharePoint, the default setting is that the person who created the blog is able to publish new blog posts directly, and everyone else has to have their blog posts approved first. We don't want that in the Inner Team site—everyone needs to be able to post directly. It's really easy to make the change.

Open the team blog, and click Manage Posts on the right side of the page, under Admin Links (see Figure 4-26).

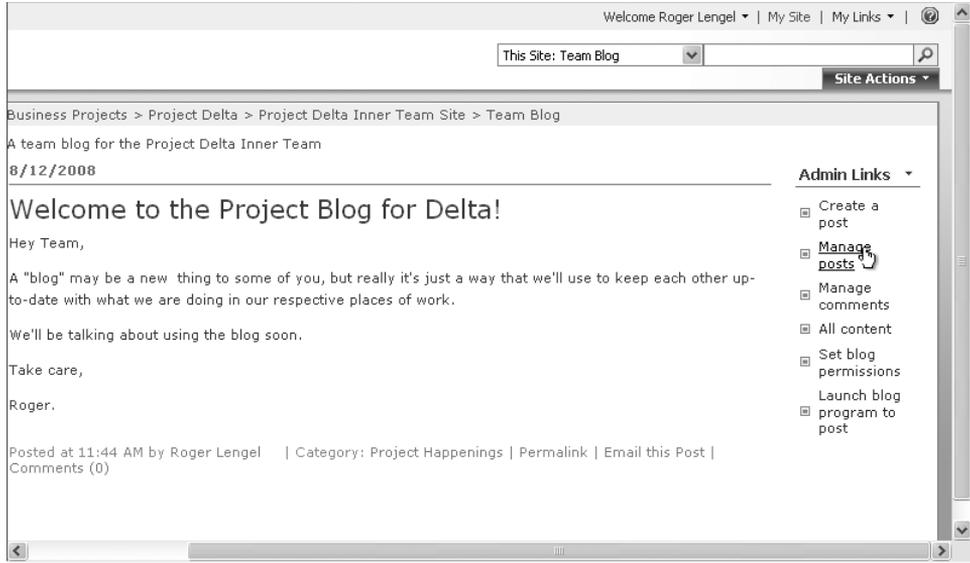


FIGURE 4-26 Click the Manage Posts link to set posting permissions.

This opens the team blog in a list view, much like we have seen already with other types of SharePoint lists. Click Settings, and then click List Settings to open the Posts page (see Figure 4-27).

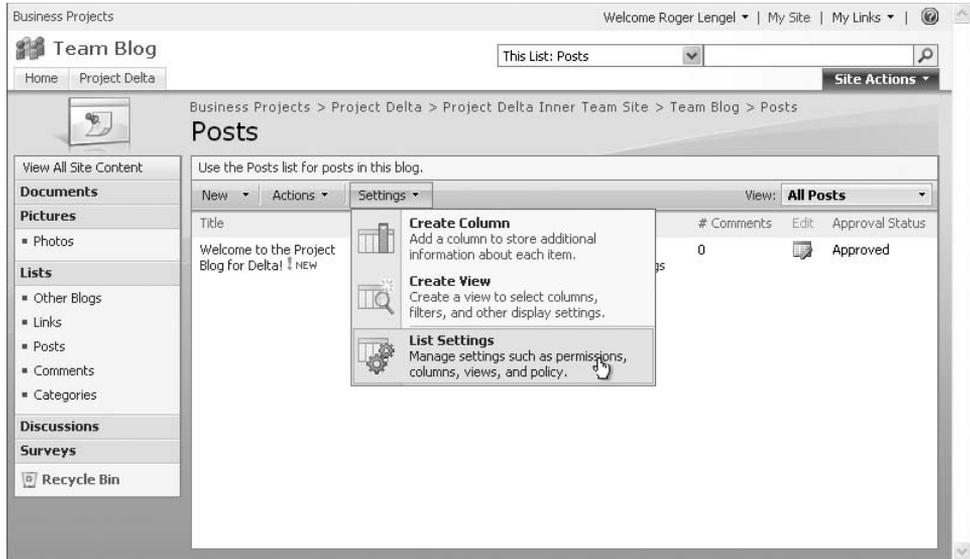
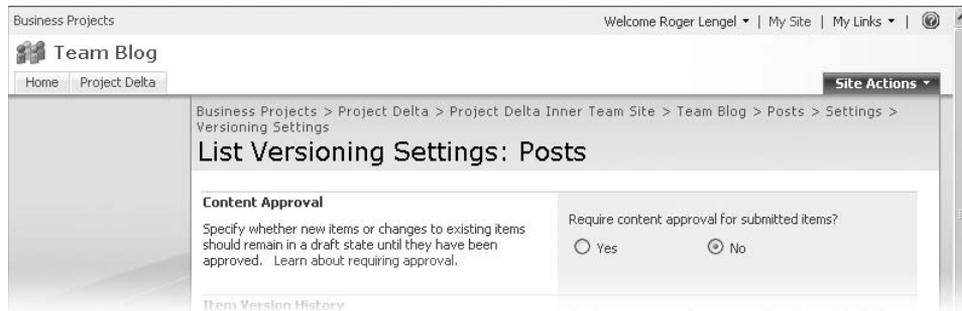


FIGURE 4-27 Open List Settings for the blog posts list.

Click Versioning Settings under the General Settings heading, and change the Content Approval option at the top from Yes to No (see Figure 4-28). Then click OK to exit the settings page.

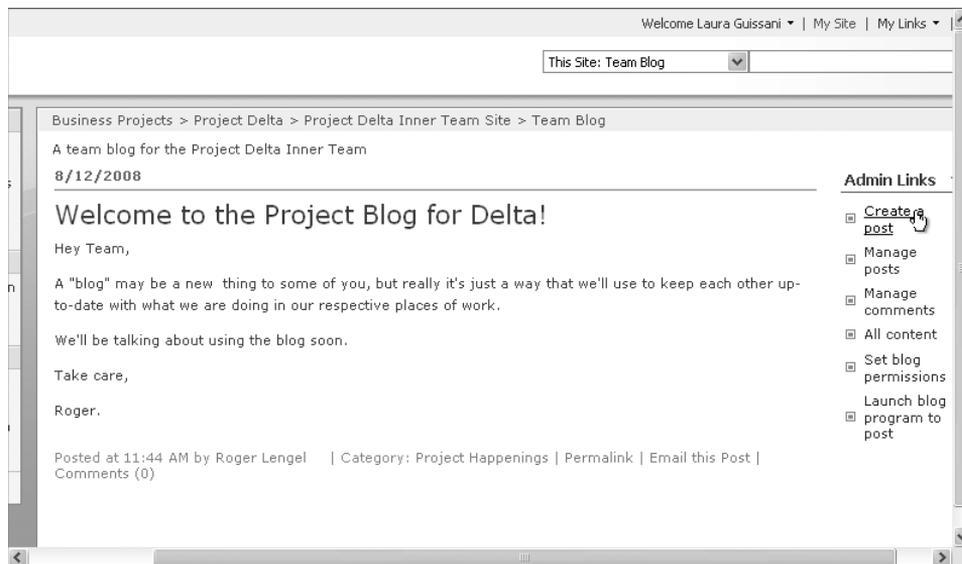


**FIGURE 4-28** Turn off content approval for blog posts.

With this change, any team member will be able to post directly on the team blog, without having to wait for their blog posts to be approved by the blog owner.

## Creating a Blog Post

Creating a blog post in the team blog is super-easy. Click into the Team Blog on the Quick Launch bar, and then click Create A Post on the right side of the page (see Figure 4-29).



**FIGURE 4-29** Team members can create blog posts.

When the new blog post page opens, enter a title, type what you are going to say, and assign your blog post to one of the categories. For example, you are going to interview a number of prospective channel partners for your project in the coming week, and that will take you out of the office. Although you will have your mobile phone with you, you will have Internet access at the hotel each night. Because it is really helpful for the others on the team to know what's happening with you in the coming week, make a blog post saying what's going on. And because the post relates to upcoming travel, include your name in the title, so others can see at a glance who the post is about (see Figure 4-30).

Business Projects > Project Delta > Project Delta Inner Team Site > Team Blog > Posts > New Item

**Posts: New Item**

Publish Cancel

\* indicates a required field

**Title \*** Traveling for the next week doing interviews (Laura)

**Body**

Hi all,  
I will be out-of-the-office and pretty hard to reach for the next week. As we discussed at our last teleconference, I will be interviewing prospective channel partners for our launch.

I'll have my mobile phone with me for really urgent contact, and will be able to check in here each night when I'm back at the hotel.

I'll be back next Monday.

Laura  
[laura@fabrikam.com](mailto:laura@fabrikam.com)

**Category** Project Happenings

**Published \***

**FIGURE 4-30** Write a blog post about what's happening in your life and work.

Now when others on the team visit the Team Blog, they'll be able to see what's up with Laura, and why she is so quiet this week!

## Winning Trust Through Blogging

Being diligent about keeping others on the team apprised of your work through the team blog greatly assists with the building of trust. When we develop trust in another person when working with them face to face, we formulate our trust quotient in them over time through repeated observation on work and react in the hurly-burly of moment-by-moment work. When we work with others who are at a distance, we form our trust based on the things that are shared between us, and on whether they do the things that they say they will do and therefore that we expect from them. If they do what they say

when they say, that signals to us that they are worthy of our trust—we can trust them: they are trustworthy. When they don't do what they say or what we expect of them (based either on job description or mutually agreed task or project division), we say that they are not worthy of our trust.

## Tracking the Team Blog Through RSS

Your fellow team members can read what you write, directly within SharePoint or by subscribing to the RSS feed for the team blog and reading it within a news reader. If you say something that they are particularly interested in, hopefully they'll leave a comment, either thanking you for what you shared, or asking you for more information. And the same applies to you; others have taken the effort to write and share what's going on in their work world, so make the effort to thank them for doing so, or to ask a question.

To subscribe to the RSS feed for the blog, click the RSS Feed link at the bottom of the Quick Launch bar for the team blog. As with the RSS feed to the announcements list that we looked at earlier, doing so will give you the option of reviewing the RSS feed that you are about to subscribe to. Click [Subscribe To This RSS Feed](#) to confirm your subscription, and be sure to put the RSS feed for the team blog into the same folder as the other RSS feeds for your project—thus keeping them all together.

Finally, if you would prefer to receive e-mail alerts about new blog posts, you can set that up too, by clicking [Alert Me](#) from the Actions menu on the team blog. Follow the same approach that you did when you set up the e-mail alert for the announcements list.

## Overcoming Silence Through Blogging

Regular blogging about your work is an antidote to another major challenge of working on a virtual team: how to interpret silence. Your team members are already invisible to your eyes, and if they are not talking to you, they also become inaudible to your ears. What do we make of this?

Silence can mean many things. It can mean that people are schedule-slammed, and have so much on their task list that they just cannot get a few spare minutes to respond to your question. Or it can mean that they are ignoring you, that they don't want to engage with you on the work that you are jointly involved with. Or it can mean that they are working away diligently on the next thing that they are supposed to be working on, and don't think it worthwhile saying that that's what they're doing, because that's what they are supposed to be doing. Or it can mean that they are angry with you, and they never want to speak to you again. Although the fact of silence is just one message (they are silent or they are not), it has many different interpretations! It's no wonder that unexplained silence can be such a challenge to the efficacy of team relationships.

When each team member writes a regular update on the team blog in SharePoint, the interpretation of silence is a lot easier. If people are schedule-slammed, a post at the beginning of the week to say that they have a super-busy week coming up, and that they'll be pretty much out of the loop goes a long way to allay fears and make it clear what's actually going on. If they are busily working away on the next deliverable that they are accountable for, they can say that. Thus the team blog can adequately deal with two of the good reasons for silence, and a well-timed comment from others on the team can remind a person that it's time to write more, or that they should keep on with what they're doing. By setting out in advance what is coming up, and what is likely to happen over the next week, the team members provide a strong basis of trust for what's coming up.

But how do you use a project blog if you're struggling with one of the other reasons? You have a grievance against one of the other team members, and it's festering away. Or you're really, really angry with what someone said to you on the last conference call, and you just want to avoid that person as much as possible. Is the project blog the place to air this?

No. It's not blog content.

You need to approach the person privately, and request a meeting. If they are in another location, as is likely to be the case, it will have to be a phone call. When you talk to the person, outline your view of what's happened, and ask how he or she sees things. Hopefully, you can come to a place of agreement or resolution. If you can't and you feel that the other person hasn't listened, you need to request the presence of another person in a second conversation, perhaps the team leader (Roger, in the case of Project Delta). If the team leader isn't the right person and you want someone external to the team, approach the right person and request his or her help. If a second conversation with someone else present (on the phone or in person) still doesn't resolve it, take it to the wider team for an all-hands-on-deck discussion. Others may be able to force a resolution that you cannot do on your own, or may drive the removal of the troublesome team member with someone better suited to the task at hand.

A powerful strategy to overcome the possibility of silence being attributable to avoidance behaviors or anger with another is for the team to have a frank conversation at the beginning of the project and agree to keep a short account with each other. For example, during one of the initial teleconferences—and definitely in the team's written working protocol—a senior member of the team should say that it is very likely that disagreements will arise during the course of this work, and that these items aren't personal but are reflective of

different interpretations of what is right according to a certain frame of reference, and that when this happens the people involved agree to resolve the issues quickly. This sets the ground rules so that when each person signs up to the team, they equally give their word of honor to be honest with their colleagues, to speak quickly about what is going on and what they are finding difficult, and to agree that they will resolve disagreements to a point that everyone can accept. Such an agreement will need to be kept alive by practice and goodwill during the course of the work, but having it in place from the beginning is a powerful counteracting strategy to something that is bound to happen.

Remember, when we work in virtual teams, all of our interaction is much more difficult than when we are together in person. In person, it somehow seems a lot easier to hash the problem out, to draw things on the board to explain our position, or to speak frankly about the problems we are experiencing than when we have to do these things remotely. But the reality is that much of our interaction with others is at a distance, and we need to get better at dealing with silence and coming to mutually agreeable resolutions when silence signals a breakdown in interpersonal relationship capability.

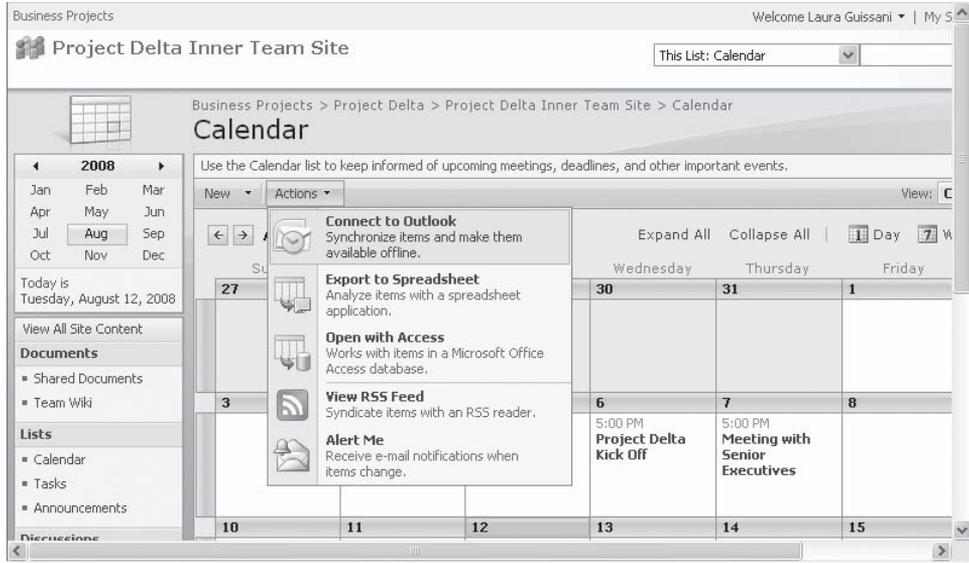
## ■ Does Offline Mean Out of Touch?

We don't live in the office, and as more of our work is facilitated through SharePoint, we need to work with our team members, the documents we are sharing, and the conversations we are having when we are offline. As a browser-based tool, SharePoint does not natively offer offline capabilities. What are people to do—like Laura, who will be interviewing channel partners for a week—when they need access to SharePoint but will not be connected to the network?

There are three approaches: two from Microsoft, and one from Colligo Networks.

### Microsoft Office Outlook 2007

The first Microsoft alternative is Microsoft Office Outlook 2007. Some of your information in SharePoint can be linked to Outlook and accessed when you are away from the office. Information like team calendars, team to-do lists, lists of contacts, and libraries of documents, among some others, can be connected to Outlook for access when offline and out of the office. For example, a SharePoint team calendar can be displayed in the Calendar part of Outlook 2007. To do this, open the calendar in SharePoint, and click Connect To Outlook on the Actions menu (see Figure 4-31).



**FIGURE 4-31** Connect a calendar list in SharePoint to Outlook.

You will be prompted to confirm the connection; say Yes. You can connect multiple SharePoint calendars to Outlook 2007, and you can see a threaded view of all your calendars. This means that you can see your personal calendar in light of all of your SharePoint meetings and milestones (see Figure 4-32).

Outlook 2007 is a great choice under two conditions. First, when your need is focused on reading or viewing the information in your SharePoint project site when you are away, connecting the information from SharePoint to Outlook 2007 is the way to go. Second, if you will want to add new items into standard lists on the SharePoint project site when you are away from the office, Outlook 2007 is a suitable tool. It doesn't let you add new documents to document libraries or view and modify custom lists, however. If you would like to save documents (such as e-mail messages) in SharePoint document libraries or folders, or need to change existing information in libraries and custom lists within Outlook 2007 when you are not connected to the network, the Colligo Contributor Add-In for Outlook, explained later in this chapter, is a better alternative.

#### SEE ALSO

For more information about Outlook 2007, visit [office.microsoft.com/en-us/outlook/default.aspx](http://office.microsoft.com/en-us/outlook/default.aspx), or read *Microsoft Office Outlook 2007 Step by Step*, by Joan Preppernau and Joyce Cox (Microsoft Press, January 2007). Visit [www.microsoft.com/mspress/books/9602.aspx](http://www.microsoft.com/mspress/books/9602.aspx) for information about this book.

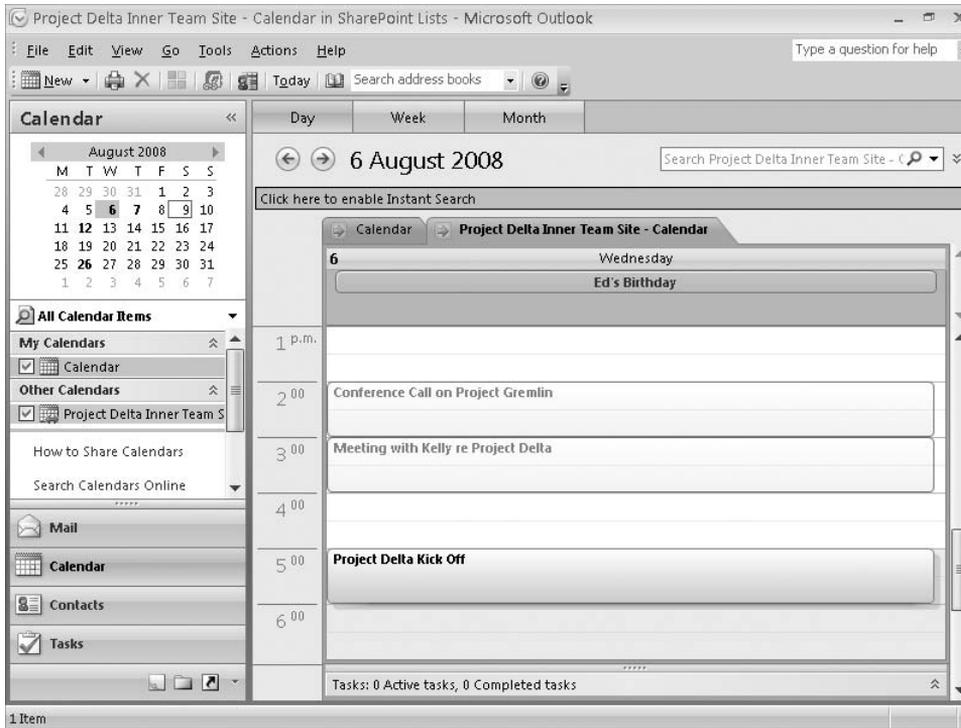


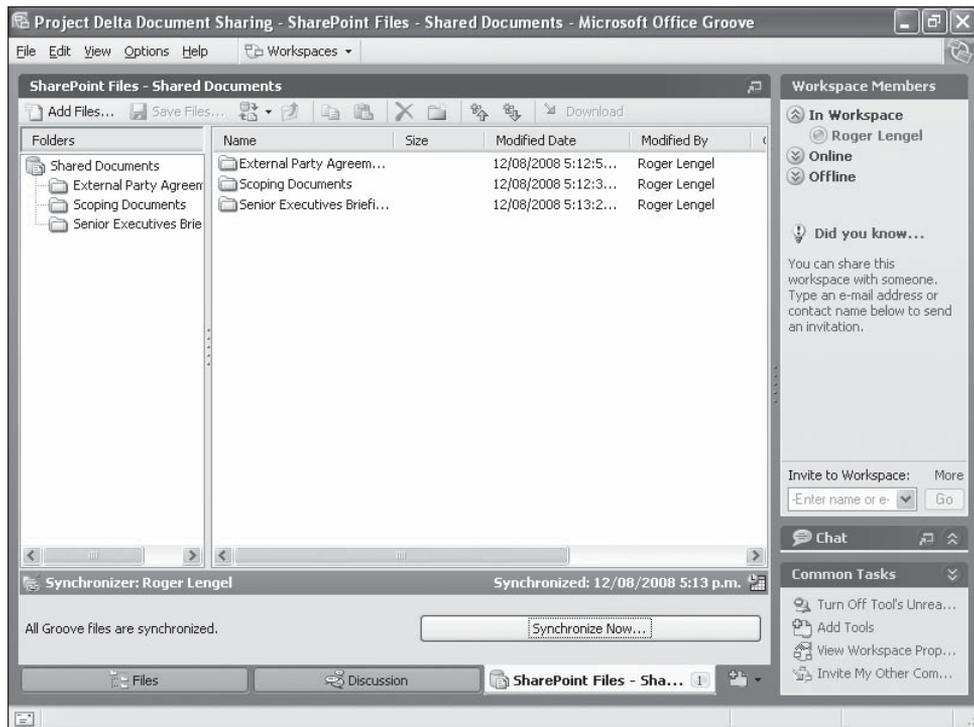
FIGURE 4-32 SharePoint calendars can be threaded with your Outlook Calendar.

## Microsoft Office Groove 2007

The second Microsoft alternative is Microsoft Office Groove 2007, a collaboration tool for teams that offers many of the same team collaboration functions that SharePoint does. Microsoft acquired the maker of Groove—Groove Networks—in April 2005. One of the capabilities offered by Groove 2007 is the ability to connect a document library from a SharePoint site with a Groove site. This means that an individual who travels frequently can take a SharePoint document library with them via Groove, and read and edit those documents while they are away from the office. When they next connect to the corporate network, Groove sends any changes made in those documents back to SharePoint, and brings down any updates since the last time the user was connected. But remember, it is only for documents—not for everything else in the SharePoint site (see Figure 4-33). We talk more about Groove 2007 for document sharing in Chapter 7, “Analyzing the Options.”

**SEE ALSO**

For more information about Groove 2007, visit [office.microsoft.com/en-us/groove/default.aspx](http://office.microsoft.com/en-us/groove/default.aspx), or read *Microsoft Office Groove 2007 Step by Step*, by Rick Jewell, John Pierce, and Barry Preppernau (Microsoft Press, January 2008). Visit [www.microsoft.com/mspress/books/11848.aspx](http://www.microsoft.com/mspress/books/11848.aspx) for information about this book.



**FIGURE 4-33** SharePoint document libraries can be synchronized and shared through Groove 2007.

## Colligo Contributor

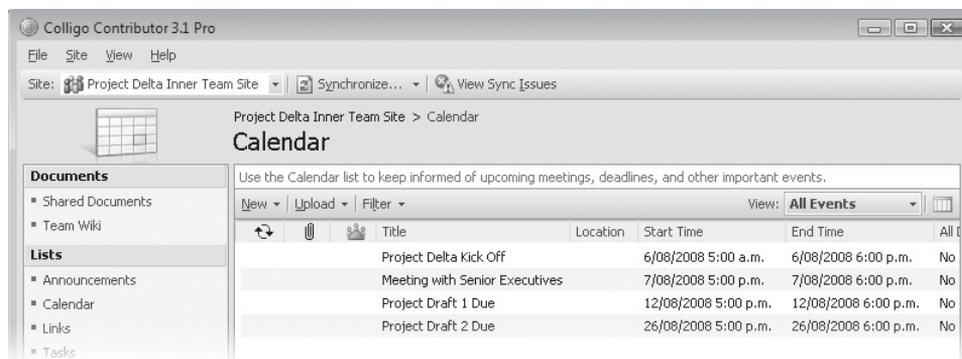
Colligo Networks is a Microsoft business partner that sells desktop applications for Microsoft SharePoint. Using Colligo Contributor, a user can connect a complete SharePoint site—or a selected subset of the site—to their desktop for access when they are offline. There are three editions of Contributor:

- A standalone client for offline access to SharePoint

- A Microsoft Outlook add-in for SharePoint document and e-mail management
- A professional edition that includes both of these interfaces

Colligo Contributor Client enables users to work with a SharePoint site through a client interface rather than a browser. The layout of the Contributor Client looks pretty much the same as it does within SharePoint. Colligo Contributor Add-In connects SharePoint document libraries, folders, and lists to a mailbox in Outlook. Users can drag documents into SharePoint and access documents and list items online or offline, directly within the Outlook interface.

With either the Contributor Client or Add-In, individuals can read items such as documents and tasks, they can make changes to the information that is in there, and they can add new items to any of the lists or libraries. When individuals are connected to the network again, any changes will be uploaded back to SharePoint, and any updates in the SharePoint site will be downloaded into Contributor. If someone else has changed the same document, task, calendar event, or other item that you changed, Contributor will tell you about the conflict and ask how you want to resolve it (see Figure 4-34).



**FIGURE 4-34** Colligo Contributor Pro offers full synchronization with SharePoint sites for offline access.

Contributor is a great choice for individuals when they are required to travel frequently as part of their work, but also need to stay in the loop on what's happening with various projects. It enables them to have their team data with them at all times, and be able to follow what's happening within the wider team, and to contribute regardless of where they happen to be. Do be aware, however, that the current edition of Colligo Contributor does not support working with wiki page libraries or wiki sites when you are offline.

#### SEE ALSO

For more information about Colligo Contributor, visit [www.colligo.com](http://www.colligo.com).



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