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'SharePoint' One Step At A Time: Building A Collaboration Environment

'You get what you pay for.' That statement used to mean that what they threw in for nothing was worth precisely that. Not anymore. Microsoft busted that myth when they threw Windows SharePoint Services (WSS) into its Windows Server operating system. You might pronounce it "wuss;" however, it is anything but that in the value it delivers through its "sharing" tools that can improve organizational efficiencies.

The buzzword today is *Collaboration*. The concept makes sense: Improve communication tools for people in all areas of your company, and you will save time, reduce duplication of work, and speed decisions that could translate to more profits. It is so powerful that you might even feel compelled to "share" some of the profits that your collaborative team helped you achieve.

WSS (also called SharePoint) helps with all this by giving your employees secure access to company information through their Internet browser on their desktop. It's basically your team website or Intranet, and it becomes the focal point for information sharing. It's loaded with features you can use, but you'll want to start gradually. That's what our defense contractor client did as they faced a big challenge in their workflow — compliance requirements.

Their big headache was the process of documenting every engineering change made to their products. The process for tracking every revision needed some consistency or they risked violating their government contract and losing the critical trail of work that was part of product development. Their contracts with the government were valued at millions of dollars; the solution was to enable document versioning on the free SharePoint included in their Windows Server operating system. It took less than an hour to fine tune the setups to meet their specific business needs:

▶ Major vs. Minor revisions. They needed to track both. Version 1.0 or 2.0 would be major revisions; Version 1.1 or 2.3 would be minor. Uncle Sam classified minor changes differently, so their tracking was different.

▶ Each of their major versions can have up to 511 minor revisions. They were able to specify how many they wanted in their SharePoint setups.

▶ They also added in "content approval," which controlled how files moved through business processes and provided a layer of document approval. The document started as a pending or draft document created by an engineer. The supervisor would then approve or reject the design change. Once approved, the document became available in the working development library for those users with security rights to that area. If rejected, the document stayed as pending and was not published for the group to see.

Versioning has another big bonus — it eliminates the need to

run for a Roloids when you click "save" on your document and fear you just saved over the original you needed to keep. In versioning, just click the down arrow on your SharePoint document, choose Version History, and the previous versions (back to as far as you are saving them) are still there. Now *that* spells relief!

It's not rocket science, but we also use versioning for our weekly meeting agendas. We can always go back to the previous week's agenda (a previous version), yet we only have to manage one document.

Of the many WSS features, not all are big and momentous, but that shouldn't discount their value. Consider the Events Calendar. If your company is like ours, there's a lot of "stuff" going on: company events, marketing activities, webinars and conferences, holidays, training classes, birthdays, and more. It's not efficient or helpful to show those on each team member's calendar, but it is important that employees know about those activities, events or holidays. We put all such items on the Events Calendar. We might send some team members to a conference to hone their skills so it's important for their fellow team members to know that in case they are the backup for client support. We also use it to remind us of Spring Break, big sporting events in town and Holiday dinners, just so we take everything into consideration for planning and scheduling.

Now, before you start complaining that "Great, now I have another file to open," take the next step with the Events Calendar, and choose "Link to Outlook." You're already in your Outlook calendar many times a day to see what's on your own schedule; now the Events Calendar can show up just like the calendar of another coworker. It's easy access to everything without crowding your personal calendar with every event.

Finally, what would a Microsoft product be if it didn't also let you tap into the power of every accountant's favorite tool — Excel. Again, WSS delivers. Consider the lowly use of Excel worksheets for storing information generated from many different sources. As an example of how this can work, I'm going to use our annual covered dish luncheon tradition, which is the Friday before Thanksgiving. Everyone brings something. But as you can imagine, we face the questions of who's bringing what and how do we know we've got all seven courses covered among 25 employees?

Old method: We set up an Excel spreadsheet with a list of everything we needed, from turkey to dessert. Then, we'd send the spreadsheet to the entire team, but we would also put a paper copy at the front desk where people could sign up. *Problems:* Not everyone is in the office and gets to see the written list. Not everyone reads all their e-mail. And the organizers feel a bit ... well, unorganized.

New method: Windows SharePoint Services. We start with the same Excel spreadsheet: Column A is food items needed, Column B is "who" volunteers to handle that, Column C is yes/no if the food

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needs to be heated. I realize it's not too exciting yet, but stay with me.

- Take the data in Excel and create a table in the spreadsheet from these fields.
- Now the fun. In Office 2007, you click anywhere in the table to activate the new Design Tab. Then, choose Export > Export table to SharePoint list. (*In Office 2003, go to data > list > publish list.*)
- Check the box to create a read-only connection to your SharePoint list. (*In Office 2003, check the box to link to SharePoint list.*) This links the SharePoint list to my Excel file on my laptop, which is way cool! To finalize the process, just name your file and enter a description.

With these few steps, I converted the file from an Excel spreadsheet to a SharePoint list. Everyone who has security rights can now access the list and make their additions and changes. Now we have a single document in a central place in a format that easily lets people add the necessary information to update it. But what about those people who still want copies on their workstations? Not a problem; they can all choose to sync the changes made to the SharePoint list down to their local Excel document. Just access the list on SharePoint and click "export to spreadsheet." Now, anyone

(such as the organizers) can have their own updated local Excel document that is updated whenever changes are made in SharePoint.

This feature presents enormous opportunities for business applications: Just insert "New Project" for Thanksgiving luncheon. Now you have a great tool for managing a big project or implementation where your team shares and updates information as the project unfolds. And while it may not be critical for an annual lunch, keep in mind that the security features inside WSS enable you to maintain control, access, and important checks and balances among users as needed.

The investment you made in your Windows Server operating system was a good one. With the WSS freebies included, you've got a cache of tools that by themselves may bring small improvements, but together can snowball into great benefits for the bottom line of your company or for the companies of your clients. Take the plunge with some or all of the three SharePoint tools covered here, and if you love what it does watch for more tips in future columns that will get you on board with sharing and collaboration using Windows SharePoint Services. ■

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