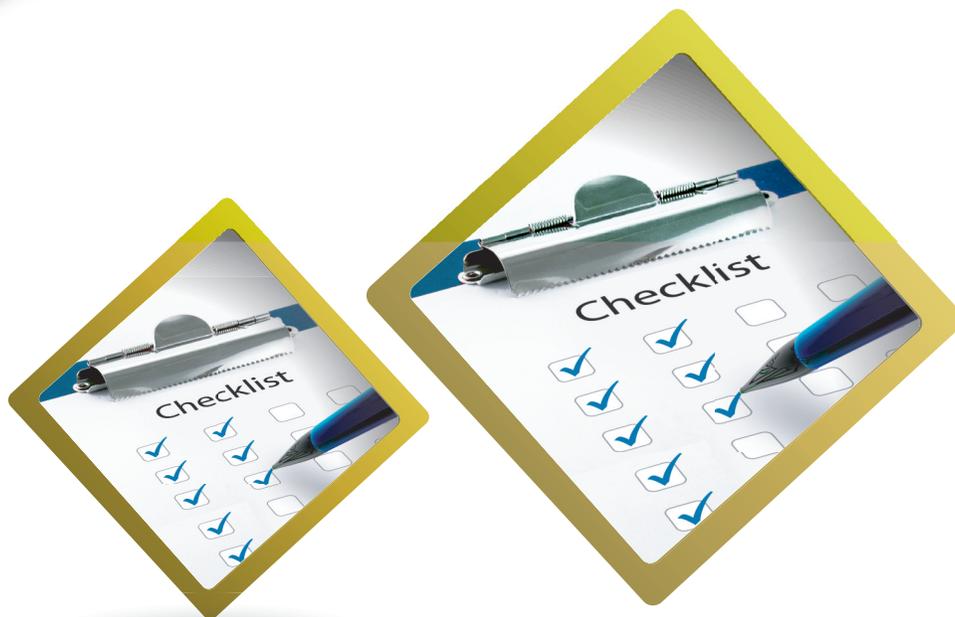


# SharePoint for Collaboration: 3 Steps to Dynamic Co-authoring



Produced by AIIM Training

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# SharePoint Collaboration: 3 Steps to Dynamic Co-authoring

You need to have your teams update various documents, but the time it takes to check-out, modify, and check-in slows the process. You would like to see what others are changing in a document quickly and not have to wait until the document is made available again. You would like a collaborative tool that allows authors to modify their sections – when the authors are available – instead of needing to wait for the document to be ready. What we are talking about here is a form of co-authoring on the part of your team. It is a collaborative effort focused on specific content with a guided purpose to produce a document of some sort as the end result.

Many organizations have brought in SharePoint to accomplish this. The thinking goes that if they use SharePoint as a collaboration tool, the process will be transformed and something good will happen. For many, this is not the case and the results aren't as good as expected. This is due to a lack of understanding and use of the full set of tools available to them. Just as an artist has a specific set of tools to use in creating a portrait or sculpture, so to do you have a set of tools to use in co-authoring.

As I mentioned, many organizations use SharePoint as a central repository in an attempt to stop or lessen the use of email as a collaboration tool. However, when it comes to co-authoring content, the thinking often stops there. Too often, everyone thinks that since the document is on the shared site, everyone will go there, do what they have to do, and, voila, mission accomplished. But . . . as much as you have SharePoint libraries to share documents, those libraries may have limited you to having only one person being able to author or edit the document at a time. There are capabilities such as checking the document out and storing multiple versions, but again this limits the editing to one person. Other common issues you may encounter include:

- Many people wanting to update a document at same time
- Tracking changes are sometimes cumbersome or time-consuming
- One person often tries to collate all changes with great effort

While this is an improvement over using email, the better approach is to use the integrated features of SharePoint 2010 and Office 2010. This combination allows dynamic co-authoring simply by opening up a file to be edited in Word and PowerPoint 2010. If Lync or Office Communication Server are being used, then the online status of fellow authors is visible within the document and instant messaging can occur while the documents are being authored. Simply stated, dynamic co-authoring allows simultaneous editing of the same document. When a user is editing part of a Word document, the paragraph they are editing is locked to other users but the other users can make their edits at the same time and are allowed to see the changes made by others once changes are saved. The same is true of PowerPoint 2010 while OneNote 2010 is slightly different in that it is automatically synchronized without the need to wait for the user to click save.

As always, it's not as simple as turning on the technology and turning your users loose: you need to plan how it will work, how to best align to meet the requirements of the business, how to train the employees, and the impact it will have on process. At a base level, here are some considerations to make related to using SharePoint for co-authoring includes:

- Permissions
- Versioning
- Check-out

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## Permissions

Co-authoring is a fantastic time saver and will greatly benefit your organization. Even so, just like any business activity and environment, not everyone should have access to everything nor should everyone be allowed to do all things. Users who want to or have the need to co-author documents must have permissions to that particular document library. The easiest way to manage this is at a site level unless specific permissions on a document are required at a lower-level. Several things to consider related to permissions include but are not limited to:

- The types of documents involved
- The level of co-authoring or editing authority at the user level
- Access and edit authorization for the entire document or a section

## Versioning

Version control is an area many organizations attempt to manage on their own and are often challenged to maintain. This is also one of the enticements of SharePoint. When planning a co-authoring environment, we recommend that you use only major versions for reasons of simplicity and manageability. You may also want to consider establishing a cap or ceiling on the number of versions that are retained. This can be configured as part of the versioning settings for the document library. Several things to consider related to versioning include but are not limited to:

- The point at which a new version takes hold
- Do notes rather than changes constitute a new revision
- Should versioning take place only after review and approval of real changes

## Check-out

Typically, you would check-out a document to work on it, rendering it inaccessible to all others until that document is checked back in and made available. In a dynamic co-authoring environment, required check-out should not be enabled and by default, check-out is not enabled in SharePoint 2010. Unless there are special circumstances related to the content type, the documents should not be manually checked out if you are to dynamically co-author them. If there is a need to restrict access while a document is in edit, a more detailed assessment will be required to determine the best approach. Several things to consider related to check-out include but are not limited to:

- Classes of information and security requirements
- Types of information as in correspondence, contracts, and Intellectual Property
- Time constraints and delivery expectations

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## Conclusion

Many organizations can and would benefit from a dynamic co-authoring environment. The process of construction, review, editing, and delivery can be significantly reduced by allowing users to access and change their section of a document without delay and even while other edits are being made. Documents that are made up of many sections and where different people are responsible for editing those various sections are ideal candidates for dynamic co-authoring. Imagine you are developing training materials or even your annual report that has several sections to be created and updated. Each of these individuals can be editing those sections simultaneously. A notification in the status bar signals when someone else starts editing the same document on which you are working. While the paragraph you are working on is locked and highlighted to let others know you are editing, they are also editing their sections. Similarly, where there is a short time frame to complete a document, dynamic co-authoring supports users in their collaborative efforts to meet the deadlines.

The discussion of using SharePoint for collaboration has never been one of lengthy debate as most agree it is a technology set designed for that purpose. The real question lies in how well it is being used and is the organization maximizing this tool to the fullest? Dynamic co-authoring is one of those areas where an organization can really gain benefit but as with all technology, it will require some planning and preparation to succeed.

Take action today. Gather your requirements, develop a strategy, and implement your plan. Take time to periodically assess whether your goals are in reach or adjustment is required. Look at how well your environment is working and seek ways to enhance it even more. This should be embedded as part of your corporate culture to ensure that processes are as effective as possible, by seeking constant improvement. The choice is yours to make.

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# About AIIM's SharePoint for Collaboration Training Program

The AIIM SharePoint for Collaboration Training Program is designed to bring you new perspectives and provide you with the knowledge and skills you need to move your organization forward in identifying new opportunities for collaborative authoring environments. You will learn how to use SharePoint as a collaboration platform. More advanced training provides strategy and advice for how to incorporate collaboration with existing business process – making them more effective.

What are you waiting for? Get started with AIIM training to learn how to maximize your SharePoint investment.

## World-Class Professional Development and Training

The course is designed for anyone who is involved in maximizing their organization's investment in SharePoint by ensuring that the collaboration possibilities of the tool are maximized. Practitioner, Specialist, and Master designations can be achieved.

### Education Around the Clock . . . Or In Person

Learn at your own pace and at your own convenience by taking the courses online. Available 24/7; learn as you have time. Classroom instruction—both public courses and private courses delivered to you—is also available.

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## About AIIM

AIIM ([www.aiim.org](http://www.aiim.org)) has been an advocate and supporter of information professionals for nearly 70 years. The association's mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud, and big data. Founded in 1943, AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education, and certification programs to information professionals. AIIM represents the entire information management community, with programs and content for practitioners, technology suppliers, integrators, and consultants.

### About the Author



Bob Larrivee joined AIIM in 2007 as an Industry Advisor and Director of the Training Center where he works to identify, develop, and deliver specialized training in best practices, technology, and methodologies. Bob is an internationally recognized thought leader with over thirty years of experience in document imaging, content management, records management, and the application of advanced technologies and process improvement. He has also received the Cenadem - Brazil ECM Pioneer Award.

Bob is an AIIM Certified Information Professional (CIP), has earned AIIM designations in ECM, ERM, BPM, EMM, E2.O, SharePoint, Capture, IOA, is a CompTIA — Certified Document Imaging Architech+ (CDIA+), and a State of Florida Certified Instructor. Bob is a published poet, photographer, and musician. Prior to joining AIIM, Bob held positions within the vendor community, as a consultant, and as a reseller. He entered the emerging technologies industry with Wang Laboratories where he focused on imaging, workflow, digital annotation, and voice recognition systems.



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