



Microsoft® SharePoint® Gives You a Realistic Approach to Content Management

Whether you are a single author or part of a team, managing your content is an important practice that ensures efficiency in your work and accuracy in your documentation. Content management practices will help you route material through an approval or signature process, ensure that the right people work on it at the right time, facilitate quality assurance, allow you to track history, and facilitate content reuse. The problem is that most content management systems are very expensive and require a large learning curve. In fact, many implementations fail because of the complexity.

Why not use Microsoft SharePoint? SharePoint has built-in document management features that you can begin using immediately without worrying about a costly implementation and learning cycle. Acquiring and implementing SharePoint is not a hard sell because most organizations already have it and if not, it has free versions. For these reasons, SharePoint is becoming the gold standard for many business activities, including content management.

This article will discuss why you should use SharePoint, what features you can take advantage of, and how Doc-To-Help fits in.

Why Use SharePoint? It Really is Easy!

The common myth about SharePoint is that it is hard to implement, impossible to use, and costly to own. These are just myths (especially when speaking about SharePoint 2010). So, let's do some myth busting.

Myth: "SharePoint is hard to implement and our IT staff would never install it."

- SharePoint is already installed on the majority of organizations' networks. It's just not being used. Check with your network administrator. It may already be available.
- SharePoint is easy to install. It starts by installing all the prerequisites and configuring the server for you and then installs the application itself. It will even automatically install and connect to SQL Server Express if you don't already have a database.
- To set up most of SharePoint's features, you follow intuitive wizards. Development or IT effort is only required when deep customization is required.

Myth: “It would take me too long to learn to use SharePoint.”

- SharePoint is designed for the average computer user. Everything is menu driven and it is a member of the Microsoft Office family of products. If you can use Word, Excel®, and Outlook®, you will have no problem with SharePoint.
- SharePoint 2010 uses intuitive Silverlight® driven menus that make features very discoverable. The user experience is actually pleasant.

Download SharePoint Foundation 2010 for free here:
<http://ow.ly/2IYSQ>

Myth: “SharePoint costs too much.”

- SharePoint is free! SharePoint has paid versions, but SharePoint Foundation 2010 (and its predecessor, Windows SharePoint Server 3.0) is free.
- Since SharePoint is so popular, self-help support information is everywhere. You can find training, tutorials, blogs, forums, and more in abundance.

How SharePoint Will Help You Manage Your Content

To understand how SharePoint can help, we need to first understand SharePoint’s approach to content management and then examine the features that you can use.

Defining Content Management in SharePoint

Let’s get our terminology straight. SharePoint has features for three practices: Enterprise Content Management (ECM), Web Content Management (WCM), and Document Management.

- Document Management: In SharePoint, you can create document libraries. These libraries are folders full of documents. SharePoint displays an organized list of the files included along with virtually any metadata you want to use to describe them. Also included is the ability to check in and out, collaborate, track version history, and apply workflows.
- Web Content Management: SharePoint can be used to create websites, mostly for Intranets, and it includes features to manage the content that gets published to those sites (called publishing sites). Web Content Management refers to the workflows, source control, versioning, and general management of this content.
- Enterprise Content Management: This refers to content management on a very large scale. This

Learn more about Enterprise Content Management by reading the Enterprise content management planning topic on the Microsoft TechNet website: <http://ow.ly/2IYRI>

concept includes enterprise technology such as regulatory compliance, complex search, enormous scalability, and records management. Document management and Web Content Management can be considered subsets of Enterprise Content Management.

Since we are talking about a realistic/simple way to approach content management in SharePoint, we are

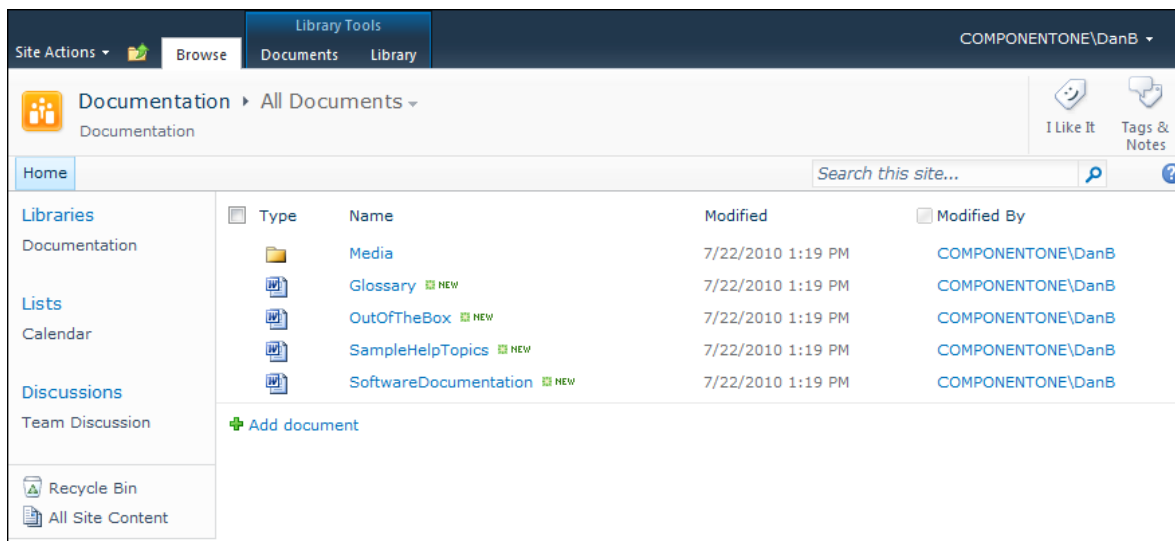
going to focus on the first, Document Management. “Documents” can be any file containing content (not just Word or PDF files). In Doc-To-Help, documents can be Word, HTML, or XHTML files.

Document Management Functions

SharePoint's document management features can be broken down into a few categories: Document Repositories, Source/ Version Control, and Workflow (which includes translation management). You can use any combination of these features right out of the box.

Document Libraries

The most common use of SharePoint today is a document repository. It uses Document Libraries, which are essentially folders where documents are stored. These folders display a list of the documents they contain. These libraries are very easy to create and are the basis of all document management technology.



Typical Document Library as seen in SharePoint 2010

Document libraries are more than just regular folders. They provide the following services:

- Fully Customizable metadata: The list of documents you see on a SharePoint page is essentially a grid (called a list in SharePoint). In the example above, the “Modified” and “Modified By” columns are the default metadata. This grid is customizable, so you can add as many columns as you want. This helps people understand what each document is and aids in search.
- Interface to documents: You will use the document library as an interface to perform all the activities described in this article.
- Templates: You can specify the template to be used when creating a new document.
- Permissions: Library owners can grant or deny permissions (read, write, etc.) for specific users and groups.

Source/Version Control

Source Control is the most basic need for document management. You need a safe place to keep your content files, you want to be able to lock them while editing to prevent conflicts, and you want to track changes.

- Check in/check out: Users can check out documents while editing. Checked out documents can only be opened as “read only” by other users. The changed version of the document will only be saved to the document library when it is checked back in.
- Commenting: Authors can enter comments when they have checked a document in.
- Versioning and Archiving: SharePoint can retain the version history of your documents. Each time a document is changed, the version number is incremented and the previous version is archived.
- Auditing: You can keep records on who changed documents, when they checked out/in, and more.
- Expiration: Time sensitive documents can be set to expire.

Workflow

Workflows route documents and send alerts to help facilitate the document lifecycle. This can be as basic as requiring a manager’s approval before content is final or as complex as a multi-level flow chart that route documents through various stages of editing and sign-off. For most people’s purposes, SharePoint’s built-in features are sufficient. More complex workflows can be designed in Microsoft Visio, SharePoint Designer, or Visual Studio.

A few functions workflows serve:

- Approval: One or more people sign-off on a document. SharePoint includes helpful tools such as organizational charts to choose approvers from and digital signature technology.
- Review and Feedback: Documents are routed to specific people for review and commenting.
- Translation Management: Copies of documents are created and stored in a translation library and translation tasks are assigned. Learn more about Translation Libraries on the Microsoft Office website.
- Work Tracking: Manages a team’s tasks by notifying the owner of a document when each task is completed.

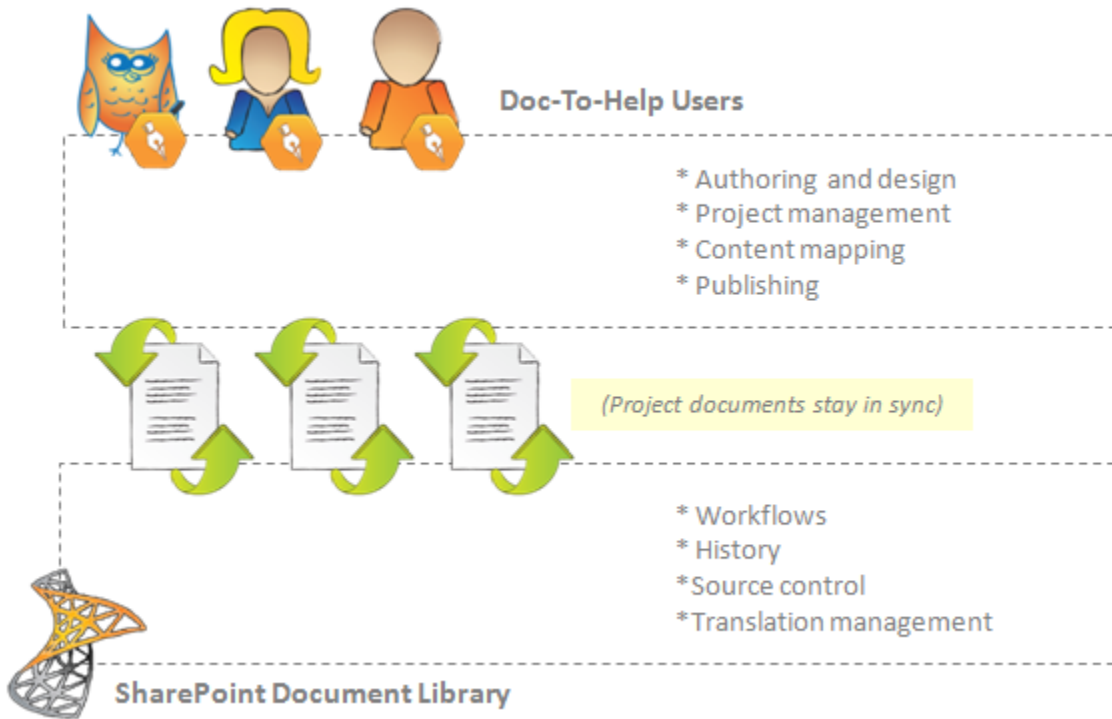
Learn more about Translation Libraries on the Microsoft Office website: <http://ow.ly/2IYUB>

How You Can Use SharePoint with Doc-To-Help

Doc-To-Help's integration with SharePoint allows you to take advantage of SharePoint's Document Libraries and all the related content management features. Doc-To-Help interacts with SharePoint in the following ways:

- **Store your content in a Document Library:**
Doc-To-Help has easy-to-use controls to upload your project content (called documents in Doc-To-Help) to a SharePoint Document Library. Once uploaded, you will have a copy of the content in the Document Library and another stored locally, on your machine. You can keep the content synchronized automatically or use an offline mode if you would rather connect and synchronize manually. The latter is typically used when working without connection to the SharePoint site.
- **Import from an Existing Document Library:**
You can import existing documents from a Document Library into your Doc-To-Help project. Once imported, you can keep them synchronized or work in offline mode.
- **Use SharePoint for source control and collaboration:**
When your documents are in a SharePoint Library, you get all the management features SharePoint offers. Doc-To-Help gives you an interface to check documents in and out so that you can lock them from editing by other users. Doc-To-Help will even visually indicate who checked a document out – whether it was another Doc-To-Help user or directly through SharePoint. If there are conflicts when you check documents in, Doc-To-Help will alert you.
- **Apply Workflows:**
In many cases, content needs to go through a process before it is final. For example, a document may need to go through an editor before it is approved for publishing. In this case, a SharePoint workflow would notify the editor when a new document is uploaded or changed. The editor would review and approve the document and then SharePoint would apply an “approved” status. That is just one example. The possibilities are endless.
- **Version History:**
SharePoint tracks version history and allows you to rollback to previous versions.
- **Manage Translation:**
SharePoint has a special type of Document Library called a Translation Library. This library will automatically create copies of documents for each language and then assign translation tasks to the appropriate people. You can then synchronize the localized content with your Doc-To-Help project and associate it with specific localized outputs.

Using Doc-To-Help and SharePoint is easy. All you need to do is use a SharePoint Document Library as your document repository and use Doc-To-Help as you normally would. The integration between the two acts as a bridge that brings SharePoint's powerful management capabilities to you and your team.



Using SharePoint as a document repository opens up a deep management feature set.

The best part is that you get all this for free! SharePoint's free version supports all these features. The obvious benefit is cost savings, but there is another, perhaps more significant benefit. That is reduced risk of project abandonment. It is very common for a team to license expensive management software and plan an extensive implementation only to abandon the project due to difficulty or lack of use. Since SharePoint is free and probably already installed, and using it with Doc-To-Help is so easy, these risks are greatly reduced.

Additional Resources:

- **Managing Translation in Microsoft SharePoint** (<http://ow.ly/2ny7i>): White paper describing SharePoint's translation management features and how Doc-To-Help fits in.
- **SharePoint Foundation Download** (<http://ow.ly/2IZ2T>): Download the free version of SharePoint.
- **Enterprise Content Management Planning in SharePoint** (<http://ow.ly/2IYRI>): A detailed Microsoft TechNet article about ECM.
- **How to Create a Translation Management Library** (<http://ow.ly/2IYUB>): Microsoft's instructions on how to use Translation Management Libraries. Note that these instructions are for SharePoint 2007, but the steps are generally the same.
- **Download Doc-To-Help** (<http://www.doctohelp.com/download>): Download a trial of Doc-To-Help.