

Office and SharePoint 2007 User's Guide

Integrating SharePoint with Excel,
Outlook, Access, and Word



Michael P. Antonovich

Office and SharePoint 2007 User's Guide: Integrating SharePoint with Excel, Outlook, Access, and Word

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For my wife of 30 years, Susan, and our wonderful daughter, Natasha. I love you both.

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About the Author

■ **MICHAEL P. ANTONOVICH** graduated from Lehigh University with a bachelor's degree in chemical engineering in 1976 and an MBA in 1980, but his career almost from the start evolved toward computers and application development. He started working with large mainframe systems but quickly developed a keen interest in microcomputers when Apple introduced its Apple II, for which he wrote his first book in 1983. Over the years, he has learned many different systems, applications, and programming languages, but the first development environment he felt really strong about was FoxBase and later FoxPro. During the '90s, he published four books on FoxPro before the Internet and SQL Server bug bit him.

In addition to his full-time jobs developing applications, Michael has conducted dozens of different computer training classes for companies and universities. In 2003, he joined the IT team of Orange County Public Schools as they prepared to launch a major new student tracking system. But the lure of the Internet along with a "little" product called SharePoint pulled him back into Internet development in the fall of 2006, when he took on the task of heading up the technical team to develop a new SharePoint portal for the school district that would provide all users with a single consistent, easy-to-use interface. While portions of that project have been completed, others are still being worked on, and some are still in planning. However, the eventual goal is to support all district Internet and intranet sites via SharePoint, as well as to encourage greater collaboration through a single portal that students, parents, staff, and the community can access anywhere, anytime.

About the Technical Reviewer

■ **DAVID PYKE** is a director of Inta Networking Ltd., an established company providing enterprise content management, public key infrastructure, and process improvement consultancy to both businesses and the public sector. He has been engaged as a consultant on several Microsoft SharePoint-based projects from the very earliest versions of the product to the latest, and has a particular understanding of how to exploit the powerful Microsoft Office portfolio to provide effective information management environments. He has one wonderful son, Herbie, and lives with his lovely and ever-patient girlfriend, Liz, in the Georgian market town of Farnham in Surrey, England.

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Thanks to Kevin Goff, a good friend since my early days of FoxBase work, whose own recent book for Apress convinced me that it was time for me to give it a go again. I'm watching for your next one, buddy.

A huge thanks must go to the entire SharePoint team at Microsoft for creating such a tremendously powerful and solid application platform like SharePoint. It was a job well done. It brings together the best of the Internet with the best of Microsoft Office in a way that can boost productivity to unbelievable heights. I have been more excited about working with SharePoint than any other product since my old FoxPro days.

A great big thank-you goes out to Charles Thompson, our former CIO at Orange County Public Schools, for having the vision to see the value of a single portal for all district information access and for giving me the opportunity to get in on the ground floor of that vision.

I'd also like to shout out a huge thank-you to Scott Tarnell. We brought Scott in to handle the administration of SharePoint, and he dove into the product, becoming an expert at not only the hardware requirements, but also the software configuration, branding, security, and countless other details. I rely on the ability to bounce ideas off Scott every day to make sure we can meet our user needs even before they know what they are.

To the rest of my SharePoint Team, special thanks to Mike Healey for helping us understand web parts and workflows, a big thanks to Shelly Henriott for making sure all the pages look good and for helping the users learn how to support their own content, and huge thanks to Serena Wright for holding us all together and keeping us moving in one direction, rather than the fifty thousand we might try if left to our own devices.

The biggest thanks, though, has to go to my wife for understanding that writing a book takes a lot of time away from other things, not just for a few days, but month after month.

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Introduction

SharePoint may be the biggest thing to affect the way you and I work in our offices since . . . well . . . since Microsoft Office. Word showed us how to write and edit our writing more efficiently on a computer screen than we ever could before with a typewriter. Similarly, Excel showed us how to manipulate numbers more accurately than any accounting sheet created with pencil and paper. (Okay, I know there were some word processors before MS Word and spreadsheets before MS Excel, but just go with me for a second.)

Over the years, Microsoft Office has become so pervasive that it is almost impossible to get an office job today if you do not have a firm understanding of at least Word and Excel. But we still store hundreds of files in dozens of different directories and even different servers across our companies. Documents are created and printed and then carried from one office to another. Sometimes, dozens of copies are made and distributed. Some get lost. Some find their way into file folders in people's desks. Others get archived into boxes and stored offsite in the fear that someday, someone may want to see them again.

The electronic revolution of the 1990s and early 2000s did not free us from paper. Rather, it seems to have buried us deeper in a rising tide of paper that comes into our inbox faster than we can file it, much less read it.

We've all heard of the utopia of a paperless society where information flows at the speed of light from its point of creation to each user who must review and approve it. Perhaps the tools were just not ready before. Perhaps we were simply missing that keystone piece that makes it all come together into a compelling argument for a new way of working with information. The Internet was not the solution, although it was an enabling piece of technology that may make our vision of the office of the future possible.

So what is the next revolution that will bring our dream of a paperless environment into reality? I believe that SharePoint collaboration and content management is that next revolution.

Oh, you say you have heard of SharePoint, but thought that it was a portal for a company's web site. Yes, that is true, but that is only one facet of a many-faceted tool.

SharePoint sits on top of the many technologies of the past. It borrows a lot from web development. But it also integrates tightly into many of the Microsoft Office products, giving them the ability to accomplish goals like the following:

- Create shared document libraries that can be accessed from anywhere a person can get an Internet connection.
- Present electronic forms for people to interactively fill in, rather than having to print the form, write on the form, send it back, and then have someone enter the data into a computer program interface.
- Store multiple versions of documents so a revision history can be retained.
- Display business information in Excel-style pages that you can even change interactively to help managers make better decisions.

Currently, a large number of IT people worldwide are beginning to use SharePoint. They are creating web sites and collaboration sites. And that is all good. However, SharePoint will not reach its full potential until every computer user who knows how to use Microsoft Office becomes as familiar with SharePoint from a user perspective as they currently are with their favorite Office application, such as MS Word or MS Excel.

No, this does not mean you need to know how to install SharePoint or even how to configure it (although understanding a little of the configuration would not hurt). However, it does mean that you need to know how to create and use libraries, lists, and many other features. It means that you should learn how to use Office tools like Word, Outlook, Excel, and Access to not only create and maintain your own files on a SharePoint site, but also store files on a centralized server at your company that you can access from anywhere you can get an Internet connection. It should not matter whether you are at home connected through your home computer or on vacation using your laptop and wireless connection at your resort. You could even be at your local library using its computer. Anywhere. Anytime. The dream of having access to your corporate data is only a connection away.

But there is more to it than just accessing your files. You can share your files with colleagues or even the project consultant who works in a different city. I will show you how you can share files with people who do not have access to your network. You can also create workflows without programming so that when a document is created, you can automatically send it to someone else to review or approve. You will see how you can consolidate your lists, calendars, and tasks from multiple sources. You will discover how easy it is to create forms for others to use through their browser. But most of all, you will see how you can become more productive and efficient using your favorite Microsoft Office tools together with SharePoint, without needing to learn programming first.

The revolution has begun. You already know how to use the basic tools. Now, let me show you how you can capitalize on those tools to take you to a new level of productivity and freedom from that paper avalanche on the side of your desk.

Who This Book Is For

This book is for anyone who wants to reap the benefits of working with SharePoint and Microsoft Office without having to learn programming. Sure, there are many additional things you can do with SharePoint if you have programming skills. There are many other books on the market that take you down that road. When you are ready to get more into programming, I recommend *Pro SharePoint Solution Development: Combining .NET, SharePoint, and Office 2007* by Ed Hild and Susie Adams (Apress, 2007), and *Microsoft SharePoint: Building Office 2007 Solutions in VB 2005* and *Microsoft SharePoint: Building Office 2007 Solutions in C# 2005*, both by Scot P. Hillier (Apress, 2007). However, there are far more office workers out there who use Microsoft Office every day who can benefit from using SharePoint without necessarily going into programming. You know who you are. You are the power users of Microsoft Office. You are the ones other people in the office come to when they need to do something in Office but don't quite know how. You are ready to take the next step in Office productivity to promote increased collaboration between members of a project or department, to build the content for intranet and even Internet sites, to replace the passing of paper in your office with electronic forms driven by workflows from person to person. You dream of a day when you will not need a single sheet of paper on your desktop to get your work done. If this sounds like I'm describing you, then this book is your starting point toward that future.

Contacting the Author

You can contact the author by e-mail at mike@micmin.org. I will be establishing a blog to go along with this book at <http://mpantonovich.spaces.live.com/default.aspx>. From time to time I will post additional tips and tricks related to collaboration between Microsoft Office and SharePoint.

