



Extending SharePoint for Real-time Collaboration:

Five Business Use Cases and
Enhancement Opportunities

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Executive Summary

Microsoft SharePoint makes it easier for people to work together, share information, manage document repositories and publish reports that help people make better decisions. More recently, Microsoft Office 365 has also been launched to satisfy a demand for cloud-enabled collaboration solution that improves the efficiency of multi-party collaboration inside and outside of the corporate firewall. Microsoft Office 365 is a packaged solution delivered and accessed over the internet that includes the Microsoft Office suite of desktop applications in addition to Microsoft's hosted server products.

However, neither SharePoint nor Microsoft Office offers sufficient support for people seeking to improve the efficiency of the collaborative process, particularly those looking for document-centric collaboration (working together inside of documents). There is a requirement for a more efficient process for sharing, reviewing and giving feedback and collaborating on document creation with both internal and external parties.

This white paper examines five common and important business use cases that require collaborative functionality that is not available or impractical to execute in SharePoint or Office 365 alone, but is easily supported with the addition of Workshare tools.

Five Use Cases	Recurring Issues Addressed
<ol style="list-style-type: none">1 Tight Integration with Outlook2 Document Review and Feedback3 External Collaboration4 Document Tracking and Creating an Audit Trail5 Version Control	<ol style="list-style-type: none">1 SharePoint user interfaces require training and make it difficult to quickly establish ad hoc collaborations2 Immature online tool support with Office 3653 Over reliance on Office 2010 for collaboration features4 Features are often incompatible with common collaboration workflows

Workshare offers an extensive file sharing and collaboration toolkit that addresses these and other similar use cases and recurring issues. Workshare can be seamlessly integrated into SharePoint to provide a complete solution when additional collaborative functionality is required, such as:

- 1 A full set of tools to view and collaborate on documents, accessible from any device with a standard web browser
- 2 An intuitive user interface minimizes gear-up time
- 3 Shared folders that allow a single document to be discussed and annotated by folder members in private while maintaining a single audit trail
- 4 Seamless integration with SharePoint/Exchange to deliver Workshare features to any SharePoint Team Site
- 5 Data policy enforcement and metadata cleaning
- 6 Document comparison on desktop, mobile and in the cloud

Workshare Solutions

Workshare Point enhances Microsoft SharePoint 2010 as a Document Management System with a “document centric” front end that provides integration to both Microsoft Outlook and Office for better Microsoft SharePoint access and content management. Workshare Point integrates with Microsoft SharePoint and Outlook.

Workshare Protect & Professional 7 provides secure, policy-enforced managed file transfer. This further simplifies and secures document collaboration by letting you push documents into the Workshare application so that reviewers can view, make comments or collaborate using any browser-enabled device. Directly from Outlook, you can set security and usage choices about the transfer and permissions on the file itself being accessed from the Workshare platform.

Workshare Online is an enterprise-class, secure file sharing and collaboration online application that makes it easier for individuals and team members to work together securely on documents and files. The service supports the sharing and collaboration of documents with both internal associates and external parties such as clients, business partners, suppliers and contractors.

USE CASE ONE: Tight Integration with Outlook

Claire wants to be a good SharePoint citizen as well as send files easily.

As a member of the SharePoint pilot, Claire wants to be an advocate of SharePoint to retrieve and file content to the Microsoft SharePoint system, but she secretly finds it quite hard to send files. She also doesn't want to use anything other than Outlook to send updates. Claire would like to:

- Open SharePoint files from Outlook
- Save local files into SharePoint from Outlook
- Attach SharePoint files to emails

Claire could complete these tasks using the standard Microsoft solution as follows:

SharePoint Alone	With Office 365
1 Create a shared Document Library	1 Create a shared Document Library
2 Download a copy of her file	2 Download a copy of her file
3 Save the document	3 Save the document
4 Open Outlook	4 Open Outlook
5 Create a new email	5 Create a new email
6 Find her saved document and attach it	6 Find her saved document and attach it

Here are some challenges with the standard solution:

- SharePoint is not integrated with Outlook, meaning that attaching files is time consuming
- SharePoint does not provide a way to preview email messages that are stored in SharePoint, so it is easy to attach the wrong file by mistake
- With SharePoint, emails have to be filed one at a time

What are the obstacles?

- 1 Too many systems with no integration
- 2 Time consuming to save and send files
- 3 User interface requires training

SOLUTION ONE: Workshare Point provides seamless access to SharePoint from the familiar Outlook navigation interface:

- Files can be selected from the SharePoint repository directly from Outlook.
- Workshare dynamically generates a policy-driven or user-chosen Document Profile, which makes saving multiple files at once a single operation.
- Using Workshare Point, Claire can access SharePoint document libraries from the Outlook navigation pane. A reading pane view in Outlook lets her perform tasks on documents within SharePoint. Claire can also easily drag-and-drop files from SharePoint into Outlook email either as links or attachments.

+ Workshare Point Solution

- 1 Intuitive integration with SharePoint and Outlook
- 2 Simple sharing workflow
- 3 Email management and document filing

SOLUTION TWO: Workshare Protect/Professional provides even tighter integration with the familiar Outlook navigation interface and additionally provides extra security and large file transfer:

- Send files from Microsoft Outlook directly and securely to Workshare's cloud collaboration application
- Create shared folders for secure online storage, access, sharing and collaboration
- Set policy to replace attachments with links based on a pre-defined file size

With Workshare Protect/Professional send link feature, Claire can be safer and smarter – and much more integrated – about sending large SharePoint files. Files that are too big for Claire's Outlook mailbox limit or her collaborator's email cap can be transferred securely. Claire's organization does not need to worry that she may resort to consumer-grade or free "alternatives" for sending files outside the firewall.

Moreover, metadata such as leftover tracked changes, speaker notes, last author's name, document editing time and more can be set to be cleaned from email attachments in line with company policy. Control and many of the key drivers of the SharePoint implementation are maintained and security is enhanced.

Taken together, these key features avoid Claire ever having to leave familiar applications. It feels natural to send and store files. Claire's happy and the SharePoint adoption Task Force is happy.

+ Workshare Protect/Professional Solution

- 1 Intuitive integration with SharePoint and Outlook
- 2 Simple sharing workflow
- 3 Secure delivery of email attachments or links
- 4 Extended file format and large file size support
- 5 Adjustable access rights
- 6 Enforced data policy and metadata removal

USE CASE TWO: Document Review and Feedback

Claire needs quick and specific feedback from her team about a tender document.

An author would like to collect feedback about her document and revise it appropriately. Take, for example, Claire from the last example, who has written a tender response for an advertising project. Claire would like to make sure that she gains consensus and approval from the entire team before it is submitted. She would like to:

- Ask each team member to review the document and provide specific feedback.
- Revise the document with the feedback in mind.
- Have the team provide additional feedback on the new version.
- Repeat the above steps until the team approves the final content.

Claire could use SharePoint as follows:

- Create a Document Workspace site that would enable her to invite other SharePoint users to a common work area. This would help Claire ensure that everyone has access to the same version of the document.
- Participants could then open Claire's document with Microsoft Word 2010 and use its annotation features to submit feedback about the document. Co-authoring is built into Microsoft Office 2010, so the team does not need to worry about the file being locked by other users.

SharePoint Alone	With Office 365
1 Create a Document Workspace	1 Steps 1 to 3 as with SharePoint
2 Upload document	2 Use the Word Web App for collaboration
3 Invite participants	
4 Use Word 2010 for co-authoring	

There are some challenges with the standard solution:

- It is often the case that some collaborators will not have Microsoft Office 2010 available. Even at the same location, it is not unusual to find different colleges use different versions of Office.
- Co-authoring in Office 2010 is not available with previous versions of Office or with the online Office 365 Word Web App.
- SharePoint user interfaces typically require training. Menu structures are often generic and numerous and it can be difficult for the average user to identify and easily grasp the options relevant to them. This increases ramp-up time and prevents adoption for many users, even when the solution would be practical for them.

What Are The Obstacles?

- 1 Office 2010 not always available
- 2 SharePoint user interfaces require training
- 3 Office 365 Web Apps do not support annotation and review

Workshare provides a complete solution for this use case by enhancing SharePoint to bring detailed review and feedback features to any SharePoint team site:

- Workshare's online application can be used to review and give feedback on documents from any device with a standard web browser.
- Workshare has a rich set of annotation and versioning capabilities.
- Participants are notified of all document-related activity so that they are kept up to date with the contributions of others.

+ Workshare Solution

- 1 Access from anywhere and any device
- 2 Comment tracking and version control
- 3 Status tracking and updates
- 4 SharePoint integration
- 5 Real time page specific messaging

USE CASE THREE: External Collaboration

Claire needs a simple way to include an external partner in the discussion about her tender document.

An author would like to collaborate on a document with an external partner. For example, Claire from the previous use cases wants to include Sophie for discussions and review. Sophie works for a partner company that provides marketing support.

What Claire needs is a Document Workspace that both she and Sophie can access.

Claire could complete these tasks using the standard solution as follows:

- Create a Document Workspace
- Create a username and password for Sophie
- Send Sophie an invitation to join the workspace

SharePoint Alone	With Office 365
<p>SharePoint must be accessible externally by people who are working outside the firewall.</p> <ol style="list-style-type: none">1 Create a Workspace2 Provision a login for the client and invite3 Use Office 2010 to collaborate	<ol style="list-style-type: none">1 Create a Workspace2 Provision a login for the client and invite3 Use Office Web Apps to collaborate

There are some challenges with the standard solution:

- SharePoint interfaces often require training, which is a problem for ad-hoc and rapid involvements.
- Sophie must use Office 2010 co-authoring features to avoid having to lock files if Claire and Sophie wish to annotate a document with the rest of the reviewing team.
- Office 365 comes with a web-enabled version of Microsoft Word called the Word Web App, but it does not support annotations or co-authoring. External collaborators might have to use standard SharePoint discussion boards or some other means external to the document to give feedback. However, when comments are detached from the content it is difficult to keep them in context, especially on frequently revised documents.

What Are The Obstacles?

- 1 User interfaces require training
- 2 Requires Office 2010
- 3 Weak online alternative

Workshare provides a complete solution for this use case by enhancing SharePoint to bring detailed review and feedback features to any SharePoint team site:

- Workshare simplifies the collaboration workflow by making it easy and intuitive to upload new documents and invite participants.
- External collaborators will receive an email invitation. If a collaborator does not have an account they can quickly and easily create one.
- Once authenticated, the collaborator can use the intuitive Workshare web interface to access all the features that they need participate in detailed review and feedback.
- Each collaborator has their own portal through which they can view status information and access all shared documents.

+ Workshare Solution

- 1 Simple sharing workflow
- 2 Intuitive interfaces that require no training
- 3 Full functionality available from a web browser from any device

USE CASE FOUR: Document Tracking and Creating an Audit Trail

Anna needs to present a final pitch document and wants to track audience use.

An author needs to share a finished document with an audience. For example, Anna would like an executive at her company and several people from a client company to view her completed pitch. Anna needs to make the process as easy as possible because she cannot expect the executive or the client to learn a complex system. Anna would also like to know what the audience is doing with the document once it is distributed.

Anna could use SharePoint as follows:

- Ensure the SharePoint site is accessible by external users (in this case the client)
- Create and send out login credentials for each member of the audience
- Upload the document so that her audience can download it, or if she is using Office 365, her audience could use the Word Web App to share it with her

SharePoint Alone

SharePoint must be accessible externally by people who are working outside the firewall.

- 1 Create a Workspace
- 2 Provision logins for audience and invite
- 3 Audience can download file

With Office 365

- 1 Create an Office 365 Workspace
- 2 Provision a login for audience
- 3 Upload document
- 3 Audience can use the Word Web App to view from anywhere

There are some challenges with the standard solution:

- Anna does not have access to a detailed file history and comment tracking.

What Are The Obstacles?

- 1 Limited analytics
- 2 No support for data visualization

Workshare provides a complete solution for this use case:

Workshare analytics are accessible from any web browser and fully track user activity. Workshare provides information on:

- Number of document downloaded
- Number of comments made
- Files added / deleted
- Members added / deleted
- New file versions
- User presence

With Workshare, the executive and the clients also have the option to view the pitch through a browser without downloading anything or opening a document editing application. The online view of the pitch also includes an easy-to-use commenting feature so that those sharing the document can exchange comments, questions and feedback without ever needing to download or open the full document file.

Workshare enhances the document presentation experience and enables and detailed document audit trail.

+ Workshare Solution

- 1 User access is monitored
- 2 File activity analytics are provided
- 3 Comments are tracked

USE CASE FIVE: Version Control

Lisa requires a single audit trail including all feedback and revisions of a document.

A manager would like to make sure that every version of a document, along with all document-related communications, is captured and available for audit. For example, Lisa is a contract manager at a corporation. She needs to:

- Ensure that a contract is viewed, revised and approved by the legal, sales, executive and production teams.
- Track what has changed throughout the process and why it has changed.
- Establish a single audit trail in order to be properly accountable for the document.

Lisa could use SharePoint as follows:

- Create a Document Workspace and invite all of the participants
- Ensure that every collaborator has Office 2010 installed so that Track Changes and annotations can be used
- Ensure that every collaborator has the correct level of permissions for the document

Given that all edits would occur on the same file, Lisa could manually compile an audit trail by looking through tracked changes, annotations and versions to help her justify any given edit.

SharePoint Alone	With Office 365
<ol style="list-style-type: none">1 Create a SharePoint workspace2 Invite all collaborators3 Use versioning, track changes and annotations with co-authoring in Office 2010	<ol style="list-style-type: none">1 Same steps as for SharePoint

There are some challenges with the standard solution:

- It is possible to work from the incorrect version of the file by mistake, especially if there are many versions in the workspace, which wastes time and creates duplicated work effort.
- Annotations in Word are not version specific, so annotations persist throughout document revisions if not cleared by a collaborator. Annotations that are not cleared could quickly start to clutter the document making it more difficult to read. Those that are cleared leave no record in the latest version of the document, making them difficult to register later.
- Annotations in the Office 365 Word Web App are not supported.

What Are The Obstacles?

- 1 No way to keep different team annotations separate
- 2 Annotations irrelevant to the version can clutter document

Workshare provides a complete solution for this use case:

Workshare's shared folders allow any number of collaboration groups to work on the same document with comments that are only accessible by members of their own folder. Workshare is fully compatible with Microsoft Word's Track Changes feature. Workshare also stores all modifications to a document which means that all back versions of the document are always available. Furthermore, Workshare annotations are filtered by version so that irrelevant annotations do not clutter a document.

Workshare enhances version control by ensuring that the most recently-uploaded file is the one that all folder members will see. Version rollback is available at any time.

+ Workshare Solution

- 1 Shared folders enable private annotations
- 2 All group activity remains attached to the same document
- 3 Annotations are version specific, increasing relevance and reducing clutter

Conclusion

In order to provide document management support to business teams, many corporations adopt Microsoft SharePoint. However, SharePoint falls short in some important business use cases. Workshare is particularly well suited to support these use cases, providing a robust set of additional functionality that can be seamlessly integrated with SharePoint to enable greatly improved review, feedback and collaborative features for any team site.

The addition of Workshare will bring the following enhancements to any SharePoint site:

- Seamless integration with Outlook
- Detailed review and feedback features
- Extended external collaboration possibilities enabling easy collaboration with external partners
- Document tracking and audit history
- All annotations remain attached to the document audit history

About Workshare

Workshare is a leading provider of secure enterprise file sharing and collaboration applications. Workshare allows individuals to easily create, share and manage high-value content anywhere, on any device. Workshare enhances the efficiency of the collaborative process by enabling content owners to accurately track and compare changes from contributors simultaneously. Workshare also reduces the commercial risk posed by inadvertently sharing confidential or sensitive documents. More than 1.8 million professionals in 70 countries use Workshare's award-winning desktop, mobile, tablet, and online applications. For more information visit www.workshare.com or follow Workshare on twitter at www.twitter.com/workshare

Workshare empowers users with a document-centric collaboration experience, enabling them to review, make content-specific comments, and update documents based on user-defined permissions. This is managed with presence indicators, real-time alerts, and activity feeds. Workshare offers a range of integrations that enable customers to embed the power of Workshare collaboration and file sharing into existing enterprise content management and productivity applications such as Microsoft SharePoint and Microsoft Office (Excel, Word, and PowerPoint).documents and PDF files.

About Workshare Point

Workshare Point enhances Microsoft SharePoint 2010 as a Document Management System by providing a document-centric front end that provides integration to both Microsoft Outlook and Office for better Microsoft SharePoint access and content management. Workshare Point integrates Microsoft SharePoint and Outlook, you can access SharePoint document libraries from the Outlook Navigation pane. A Reading Pane view in Outlook lets you perform tasks on documents within SharePoint. You can also easily drag-and-drop files from SharePoint into Outlook email either as links or attachments.

About Workshare Protect

With Workshare Protect, you can remove hidden information (metadata) to protect against financial risk, a competitive disadvantage, or in an embarrassing situation with costly consequences. Customizable with more than 25 document security options with unique settings for different types of recipients, Workshare Protect removes hidden information to reduce the risk of inadvertent exposure of confidential information with automated alerts and one-click removal of hidden information such as tracked changes, speaker notes, the author's name, and document editing time from Microsoft Office documents and PDF files.