

Microsoft SharePoint
Products and Technologies

Good, Better, Best: Windows SharePoint Services Integration with Microsoft Office

White Paper

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Table of Contents

Introduction 1

Good, Better, Best 2

Good: Microsoft Office 2000 2

Better: Microsoft Office XP 2

Best: Microsoft Office 2003 3

Document Workspace Sites 4

Meeting Workspace Sites 4

Other New Features in Windows SharePoint Services 4

Comparison of Integration Features 6

Conclusion 9

More Information 10

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Introduction

Microsoft® Windows® SharePoint™ Services is a component of Microsoft Windows Server 2003 that provides tools for information sharing and document collaboration that users and teams can use to work together with speed, security, and flexibility. This paper focuses on integration between Windows SharePoint Services and Microsoft Office 2003 Editions. Other server products that build upon the Windows SharePoint Services foundation, such as Microsoft Office SharePoint Portal Server 2003, also make use of the features and technologies described in this paper. Windows SharePoint Services and SharePoint Portal Server 2003 comprise the latest version of Microsoft SharePoint Products and Technologies, a powerful set of tools for organizing information, managing documents, and providing efficient collaboration tools that are easy to use.

The collaborative tools provided by Windows SharePoint Services are easy to use, so you can share files and information and communicate more effectively with your coworkers. You can easily create and use SharePoint sites for any purpose. For example, you can create a site to serve as the primary Web site for a team, or you can build a site to help users meet short-term or long-term shared work goals. A typical SharePoint site might include a variety of useful tools and information, such as shared document libraries, contacts, calendars, task lists, discussions, and other powerful information sharing and visualization tools.

Sharing documents and information is only part of what you can do with Windows SharePoint Services. Microsoft Office is closely integrated with Windows SharePoint Services, so you can use features from Windows SharePoint Services in your Office applications. Many important Windows SharePoint Services features are integrated with Office menus and features. You can even create SharePoint sites from your Office applications as part of your regular work routine, so you can be more productive without needing extensive training or specialized technical knowledge.

This paper describes how Windows SharePoint Services and Microsoft Office work together. Additionally, it describes the different levels of integration between Windows SharePoint Services and Office 2000, Office XP, and Office 2003 Editions. Office 2000 provides very basic integration with Windows SharePoint Services, and Office XP provides some additional integration features. However, Office 2003 Editions provide enhanced integration with Windows SharePoint Services.

Good, Better, Best

Windows SharePoint Services and Microsoft Office are natural partners in a productive, connected computing environment. Microsoft is committed to integrating the power of work-sharing tools and the Web into the productivity applications that most users already know. Microsoft Office 2000, Microsoft Office XP, and Microsoft Office 2003 Editions represent increasing levels of integration between the Microsoft Office suite and Windows SharePoint Services.

- **File Save Integration** – Microsoft Office 2000 provides basic integration with Windows SharePoint Services. Users can open and save files stored on SharePoint sites from their Office 2000 applications and receive alerts in Microsoft Outlook® 2000.
- **Basic Data Integration** – Microsoft Office XP provides additional data integration between SharePoint sites and Microsoft Office, so users can export list data to Microsoft Excel 2002 and view properties and metadata for files stored on SharePoint sites.
- **Contextual Integration** – Microsoft Office 2003 Editions add rich contextual integration between Microsoft Office and Windows SharePoint Services, integrating SharePoint fully into the business tasks that users perform every day.

Good: Microsoft Office 2000

Microsoft Office 2000 provides simple file save integration with Windows SharePoint Services. Microsoft Office 2000 users can interact with documents on SharePoint sites from their Office applications. However, Office 2000 users cannot use some advanced features of Windows SharePoint Services, and some features may require additional steps.

Your organization may want to use Microsoft Office 2000 with Windows SharePoint Services in the following situations:

- Some users still use older software while upgrades are planned or carried out.
- Your organization supports mobile users who access information from their home computer with a variety of software.
- Users from outside your organization (for example extranet partners and customers) use their own equipment and software to access the portal.

Using Microsoft Office 2000 with Windows SharePoint Services helps users who occasionally share work with team members or who create documents of interest to other users by allowing them to interact with other team members and publish their documents to SharePoint sites where other users can find them. However, if you need more document collaboration and sharing capabilities, Microsoft Office XP and Microsoft Office 2003 Editions provide better integration with Windows SharePoint Services.

Better: Microsoft Office XP

Microsoft Office XP is designed specifically to take advantage of SharePoint Team Services from Microsoft, the precursor to Windows SharePoint Services. This allows Office XP to use features such as data integration with Windows SharePoint Services, including interactive access to data stored on SharePoint sites. Office XP is not fully integrated with some of the new features of Windows SharePoint Services (for example,

you cannot use Office XP applications to create Document Workspace sites, Meeting Workspace sites, or shared attachments in Microsoft Outlook 2002). However, you can use your Web browser to create these sites and add attachments on your SharePoint sites.

Office XP is a good choice for users who occasionally need to use features of Windows SharePoint Services. For example, users who occasionally share document authoring work with a team can use many of the document management features of Windows SharePoint Services, including the ability to check-in, check-out, and publish documents. Additionally, Office XP is a good choice for users who want to use SharePoint sites to share their data. However, if users share work extensively, need to access and analyze data stored on SharePoint sites, or want to use Microsoft FrontPage® to customize lists or Web Parts on their SharePoint sites, Office 2003 Editions are a better choice.

Best: Microsoft Office 2003 Editions

Microsoft Office 2003 Editions are the best choice among Office versions for users who want to take full advantage of integration with Windows SharePoint Services. The main advantage of using Office 2003 Editions with Windows SharePoint Services is the close integration between Office 2003 Editions and Windows SharePoint Services. Office 2003 Editions provide familiar tools such as Microsoft Office Word 2003, Microsoft Office Excel 2003, and Microsoft Office PowerPoint® 2003.

Office 2003 Editions make using Windows SharePoint Services easy, so your company can get the most out of its investment in both Windows SharePoint Services and Microsoft Office. With Office 2003 Editions, users can take advantage of Windows SharePoint Services to create documents, to organize team meetings and activities, to access and analyze data from SharePoint sites, and to use Microsoft Office FrontPage 2003 to customize lists or Web Parts on SharePoint sites. Users can also use the superior data integration between Office 2003 Editions and Windows SharePoint Services, moving data to and from the SharePoint site and creating databases linked to data stored on SharePoint sites.

Microsoft Office FrontPage 2003 has been enhanced with new tools for designing and editing SharePoint sites. You can use FrontPage 2003 to package SharePoint sites for easy deployment and to create powerful, data-driven Web pages.

Two new applications in Microsoft Office 2003 Editions are also integrated with SharePoint Products and Technologies: Microsoft Office OneNote™ 2003 and Microsoft Office InfoPath™ 2003.

With the OneNote note-taking program, you can gather and organize pieces of information from multiple sources. Windows SharePoint Services recognizes the OneNote file format, so you can search the contents of OneNote files stored on SharePoint sites. You can also create a shared OneNote notebook for your team by saving it to a SharePoint site.

With the InfoPath information-gathering program, teams and organizations can develop and deploy dynamic forms that connect people to line-of-business applications and business processes. With InfoPath, you can use customer-defined data standards to accurately and efficiently gather information. InfoPath can also store and aggregate forms in SharePoint document library sites.

Additionally, Windows SharePoint Services is integrated with Microsoft Project Server 2003, part of the Microsoft Office System. Project Server 2003 can use Windows SharePoint Services for document management, risk management, and issue tracking. The Web Access feature in Office Project 2003 uses Windows SharePoint Services to

create and track documents, risks, and issues and link them to a project or to specific project tasks on a SharePoint site.

Upgrading to Microsoft Office 2003 Editions is the best way to start taking advantage of Windows SharePoint Services today. Companies that do not plan to upgrade or that have not yet upgraded their workstations to Office 2003 Editions may want to consider providing Office 2003 Editions to users who can get the most value out of Windows SharePoint Services. For example, Office 2003 Editions are a good choice for teams with members in different locations. The tight integration between Windows SharePoint Services sharing tools and Office 2003 Editions can help these users significantly improve their productivity. Microsoft Office 2003 Editions are also the best choice for analysts and other users who need live, up-to-date access to data. These users can use Microsoft Office 2003 Editions to analyze and manipulate live data stored on SharePoint sites to be more effective in their work. Additionally, Microsoft Office 2003 Editions provide the best support for XML of any version of Microsoft Office. Companies that want to use XML to automate and streamline their business processes should consider using Microsoft Office 2003 Editions with Windows SharePoint Services.

Document Workspace Sites

Most companies still use e-mail and file shares as their primary document sharing tools. When a user creates a document, they e-mail the document or a link to the document to co-authors and reviewers. This method can lead to confusion about who has the authoritative version of a document. If the document is stored on a file share, it can be difficult to identify the source of changes and to roll the document back to a previous version if the changes are not approved. With Microsoft Office 2003 Editions, a user can automatically create a Document Workspace site and a shared attachment when they e-mail a document to other users for review. A Document Workspace site is a SharePoint site that holds information relevant to the shared work on a document, including information stored in SharePoint lists (for example, members, tasks, links, and related documents). A shared attachment is a document that is stored on a SharePoint site and linked to a file attachment in an e-mail message. When you create a shared attachment, Windows SharePoint Services stores the document, and you can configure the Document Workspace site to track document versions. When you turn on this feature, users can view previous versions of the document, and you can roll back changes, if necessary.

Meeting Workspace Sites

A Meeting Workspace site is similar to a Document Workspace site. However, where a Document Workspace site is pre-populated with information relevant to shared documents, a Meeting Workspace site is pre-populated with information relevant to meetings. Office 2003 Editions users can create a Meeting Workspace site automatically as part of scheduling or requesting a meeting in Microsoft Office Outlook 2003, so users can share work effectively without having to take the time to set up a Web site or make a request to the IT department and wait for the IT staff to fulfill it. You can also create Meeting Workspace sites for recurring meetings so team members can track progress for ongoing tasks or projects.

Other New Features in Windows SharePoint Services

The following features of Windows SharePoint Services are also integrated with Microsoft Office 2003 Editions.

Improved Document Management – Windows SharePoint Services includes enhanced document management capabilities. When an Office 2003 Editions user saves a document, metadata about that document is automatically saved to the SharePoint site. Additionally, Windows SharePoint Services tracks versions of files – including Office documents – that are stored on SharePoint sites and provides document check out and check in features on the **File** menu in Office 2003 Editions applications.

Office Components for SharePoint Products and Technologies – Additional templates and tools that extend the features of Windows SharePoint Services are available in the Office Components for SharePoint Products and Technologies for Microsoft Office 2003 Editions. The Office Components for SharePoint Products and Technologies include templates you can use to access Microsoft Great Plains data through Windows SharePoint Services, and it includes additional data calculation Web Parts.

Person Names Smart Tag – When Office 2003 Editions are installed on a workstation, it enhances Windows SharePoint Services with the Person Names Smart Tag, which provides presence information about the availability of members of your SharePoint team wherever their names appear on a SharePoint site. This information includes whether team members are online, available for an Instant Messenger session, or able to share a whiteboard. The Person Names Smart Tag also simplifies sharing and communicating between team members by allowing users to start an e-mail message to that person and adding that person to their contacts list from within a SharePoint site.

Improved Integration with Outlook – Users typically use e-mail to share much of their work, so Windows SharePoint Services provides extensive integration with Outlook 2003. On a Contacts list or Events list SharePoint site, you can click **Link to Outlook** to create a read-only contact or calendar folder in Outlook 2003. This folder is synchronized with the online list whenever you use Outlook to connect to the SharePoint site. Additionally, when you receive a Windows SharePoint Services alert, the alert contains additional information that Outlook 2003 can use to run enhanced rules for sorting and filing your alerts.

Improved Integration with Excel – You can use new integration features in Excel 2003 to access, analyze and manipulate data stored on SharePoint sites. Excel 2003 provides two-way synchronization between Excel spreadsheets and SharePoint lists, so you can work with lists when you are offline and then synchronize the changes when you reconnect. Additionally, you can export Excel data to a SharePoint site as a custom list.

Improved Integration with Microsoft Access – You can now export tables from Microsoft Access 2003 to SharePoint lists, and you can import or link SharePoint lists to database tables in Access 2003.

Improved Integration with Microsoft FrontPage – You can use Microsoft FrontPage 2003 to modify and customize SharePoint sites. With FrontPage 2003, you can manage list views, edit pages, add Web Parts to pages, and design templates for SharePoint sites. FrontPage 2003 also includes reporting capabilities that you can use for tracking and reporting site page data and usage statistics.

Create Data Driven Web Parts – You can also use FrontPage 2003 to create data-driven Web Parts that connect to a variety of back-end data sources and present that data live on your SharePoint site.

Solution Packages – You can use FrontPage 2003 to create site solution packages that can be easily deployed. For example, you can create a team solution package for your company that fits company requirements and Intranet standards, and then deploy the package wherever a team needs a replica of a designed or customized list. FrontPage 2003 includes solution packages that you can use to add Web logs and news and reviews to your SharePoint sites.

Microsoft InfoPath 2003 Integration – InfoPath 2003 is a new Microsoft Office System program. You can use InfoPath to create rich XML-aware forms for gathering and sharing information, and you can publish InfoPath solutions to SharePoint document libraries. Additionally, you can use SharePoint Business Document Libraries to launch InfoPath and automatically aggregate data from a group of similar InfoPath documents stored in SharePoint. For example, if your team uses InfoPath to store status reports in a SharePoint document library, you can create an aggregate status report to gather the data from multiple status reports in the library.

Comparison of Integration Features

The following tables show the integration features between Windows SharePoint Services and each version of Microsoft Office.

General Integration Features

Feature	Office 2000	Office XP	Office 2003 Editions
Save and open files from SharePoint sites	Yes (Excel, FrontPage, PowerPoint®, Microsoft Project, Word)	Yes (Excel, FrontPage, PowerPoint, Microsoft Project, Visio, Word)	Enhanced (Excel, FrontPage, InfoPath, OneNote, Outlook, PowerPoint, Microsoft Project, Publisher, Visio, Word)
Create new documents in Web browser	No	Yes (Excel, FrontPage, PowerPoint, Word)	Yes (Excel, FrontPage, InfoPath, PowerPoint, Microsoft Project, Publisher, Word)
Collect metadata automatically	No	No	Enhanced (Excel, PowerPoint, Word)
Promote and demote file properties and metadata automatically	Data stored, but not displayed (Excel, FrontPage, PowerPoint, Word)	Yes (Excel, FrontPage, PowerPoint, Word)	Enhanced (Excel, FrontPage, InfoPath, PowerPoint, Visio, Word)

Track document versions	No. Use Web browser to view and manage document versions.	No. Use Web browser to view and manage document versions.	Enhanced (Excel, PowerPoint, Visio, Word)
Check-out and check-in documents	No. Use Web browser to manually check-out and check-in documents.	No. Use Web browser to manually check-out and check-in documents.	Enhanced (Excel, PowerPoint, Visio, Word). Use Web browser to manually check-out and check-in other types of documents.
Manage Microsoft Project documents, risks, and issues	No	No	Yes
Upload multiple documents	No	No	Yes
Inline discussions	Yes	Yes	Yes
Microsoft Office Components for SharePoint	No	No	Yes
Person Names Smart Tag	No	No	Yes
Integration with Microsoft Business Solutions	No	No	Yes

Document Workspace sites

Feature	Office 2000	Office XP	Office 2003 Editions
Shared attachments	No	No	Outlook attachments
Create Document Workspace sites automatically	No	No	Yes, with shared attachments
Shared Workspace task pane	No	No	Yes (Excel, OneNote, Microsoft Project, PowerPoint, Visio, Word)
Document updates for shared attachments	No	No	Yes (Excel, PowerPoint, Visio, Word)
View and edit a shared attachment	Yes	Yes	Yes

Meeting Workspace sites

Feature	Office 2000	Office XP	Office 2003 Editions
Create Meeting Workspace sites automatically	No	No	Yes (Outlook meeting, or from SharePoint events list)

Outlook Integration

Feature	Office 2000	Office XP	Office 2003 Editions
Synchronize calendar and contact list sites	No	No	Yes (Outlook)
Alerts	Yes	Yes	Improved (Alerts on lists, more alert information)
Alert integration with Outlook	No	No	Yes (Outlook)

Excel Integration

Feature	Office 2000	Office XP	Office 2003 Editions
Two-way synchronization with SharePoint lists	No	No	Yes
Export list data to Excel spreadsheet	No	Yes	Yes
Create custom list from Excel spreadsheet	No	No	Yes

Access Integration

Feature	Office 2000	Office XP	Office 2003 Editions
Link table to SharePoint list	No	No	Yes
Export list data to Access database table	No	No	Yes
Create custom list from Access database table	No	No	Yes

FrontPage Integration

Feature	Office 2000	Office XP	Office 2003 Editions
Edit and customize Windows SharePoint Services Web sites	No	No	Yes
Create and customize data-driven Web Part Pages	No	No	Yes
Solution packages	No	No	Yes
Browse and search Web Part galleries	No	No	Yes
Manage list views	No	No	Yes
Design templates	No	No	Yes
Web Part connections	No	No	Yes
Backup and restore site	No	No	Yes

InfoPath Integration

Feature	Office 2000	Office XP	Office 2003 Editions
Business Document Library	N/A	N/A	Yes
Edit documents in InfoPath	N/A	N/A	Yes
Aggregate business reports	N/A	N/A	Yes

Conclusion

Windows SharePoint Services provides advanced collaboration and information sharing tools for end users. Windows SharePoint Services is designed for ease of use and seamless integration with the productivity tools that users already know. Microsoft Office provides many integration points with Windows SharePoint Services. Microsoft Office 2003 Editions provides the most extensive integration with Windows SharePoint Services. If your company uses an earlier version of Microsoft Office, review the tables and information in this document to evaluate the level of integration between Windows SharePoint Services and your version of Microsoft Office. Many companies may decide to upgrade some or all of their workstations to take full advantage of the integration between Windows SharePoint Services and Microsoft Office 2003 Editions.

More Information

For more information, visit the following Microsoft Web sites:

[SharePoint Products and Technologies Home Page](#)

[Microsoft Office Home Page](#)

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