

Microsoft Office SharePoint Server 2007
Customising the Document Information Panel
Demo Scenario



Produced By:

William Cornwill
SharePoint TSP
Microsoft Australia

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Before You Begin

Before presenting this demo, the presenter should be familiar with the basic functions of Office and SharePoint 2007 and Office Info Path 2007.

This guide walks through a number of demos covering creating a new compliance correspondence memo content type, assigning to a document library and customising the Document Information Panel using Office Info Path 2007. This guide is meant to give the audience a basic understanding of the breadth of the capability in the 2007 Office System content types.

User Account for Demos

Account	Password	Role
Administrator	pass@word1	System Administrator

General Tips and Tricks

- If you're using a laptop or Tablet PC and will be using a projector or other large display for your demo, test your PC's ability to send video to an external display.

Customising the Document Information Panel

Messaging	Actions
Creating a Word Template	
<p>You might be familiar with the what Microsoft Office SharePoint Server 2007 is capable of regarding managing and collaborating on documents, but let's just take a brief look.</p>	<ol style="list-style-type: none"> 1. Open the browser and navigate to the top level site. <i>Note: for demo purposes set the home page</i> 2. Create a new site using the Blank Site template, call the site "Team Site" 3. In the new site, create a new Document Library, call the library "Compliance" 4. Click the arrow icon next to New
<p>As you can see we are able to create a new document using the normal document template. Although this provides some functionality, we would like to assist the users with choosing an appropriate template such as a Compliance Correspondance Memo.</p> <p>So lets create a new Word template for our company Compliance Correspondance Memo.</p>	<ol style="list-style-type: none"> 5. Launch Microsoft Word. 6. Open the Compliance Correspondance template. 7. Close Word.
Creating Site Columns for Metadata	
<p>One of the other important features of Microsoft Office SharePoint 2007 is the ability to attach metadata to items such as documents. This metadata assists user's to classify content and to locate the content in the future.</p> <p>For our company memo, we are going to add some additional metadata elements to assist users.</p>	<ol style="list-style-type: none"> 8. Open the browser and navigate to the new Team Site 9. Using Site Actions, select the Site Settings link 10. Choose the Site columns option from the Gallaries menu
<p>We are going to create three new site columns;</p> <ol style="list-style-type: none"> 1. From; a text field to hold the name of the person sending the memo 2. Memo Date; a date field to hold the date of the memo 3. Audience; a text field to hold the intended 	<ol style="list-style-type: none"> 11. Click Create 12. Column Name: From Column Type: Single line of text Group: New Group "Company Columns"

Messaging	Actions
<p>audience of the memo</p>	<ol style="list-style-type: none"> 13. Click OK 14. Click Create 15. Column Name: Memo Date Column Type: Date and Time Group: Existing Group "Company Columns" Make this column a mandatory column 16. Click OK 17. Click Create 18. Column Name: Audience Column Type: Single line of text Group: Existing Group "Company Columns" 19. Click OK
Creating Site Content Type	
<p>Great now we have some new columns, but how do we associate them with the Document Library and the Word Template? This is done by creating a Site Content Type.</p> <p>A Content Type is important to SharePoint because it allows you to define the metadata that should be recorded, the template that should be used for new instances and document management and rights management policies.</p>	<ol style="list-style-type: none"> 20. Using Site Actions, select the Site Settings link 21. Choose the Site content types option from the Galleries menu 22. Click Create 23. Name: Compliance Correspondance Description: Leave Blank Parent Content Type: Choose Document Content Types for the first drop down and Document Group: New Group "Company Content Types" 24. Click OK
<p>Now we have a new Company Compliance Correspondance Memo Content Type, we now need to associate the metadata site columns we created before.</p>	<ol style="list-style-type: none"> 25. In the Columns section, click "Add from existing site columns" 26. Select the "Company Columns" group 27. Add each of the Site Columns we created before: <ul style="list-style-type: none"> - From - Memo Date

Messaging	Actions
	- Audience 28. Click OK
Great, now there is one more step we need to do to ensure that the Content Type is complete and that is associate the Word template we created.	29. In the Settings section, click the Advanced settings link 30. In the Document template section, we are going to upload the Word template, browse for the .dotx file we created before. 31. Click OK
Managing Content Types in Document Libraries	
Now we have a new Content Type that has metadata associated and a Word template also, now we need to hook it up to the Compliance Document Library.	32. Navigate to the Compliance document library 33. Under the Settings menu, choose Document Library Settings
You'll see that we are able to maintain several elements of the document library, such as security, policies, manual columns and views. What we need to do is enable Content Type management on this document library. This is done under Advances settings.	34. In the General settings section, click the Advanced setting link 35. Change "Allow management of content types" to Yes 36. Click OK
You'll see now that we have a new section in the Document Library Setting screen for Content Types. Let's add the Company Complicance Coresspondance Memo content type.	37. Choose, "Add from existing site content types" link 38. Select the "Company Content Types" group 39. Add the "Compliance Correspondance" content type 40. Click OK
For housekeeping, we are also going to remove the default "Document" content type from the document library.	41. Click on the "Document" link 42. Click on the "Delete this content type" link 43. Click OK on dialog.

Messaging	Actions
Changing the View to show our Metadata	
<p>Just before we see the new document template in action, I want to do one more thing and that is to change the document library view to show our new metadata columns.</p>	<p>44. In the Views section of the Document Library Settings, click the “All Documents” link</p> <p>45. Tick the three new columns to enable them to be displayed</p> <ul style="list-style-type: none"> - From - Memo Date - Audience <p>46. Click OK</p>
<p>You’ll now see the new metadata columns being displayed in the document library</p>	
Let’s see the template in action	
<p>Now lets create a new company compliance correspondence memo, using the new template and content type.</p>	<p>47. Navigate to the Compliance document library</p> <p>48. Click the arrow icon next to New</p>
<p>As you can see we now have a new template for the user to choose from “Compliance Correspondance”</p>	<p>49. Click on “Compliance Correspondance”</p>
<p>Microsoft Office Word 2007 starts and the Company Compliance Correspondance Memo template is loaded.</p>	<p>50. Enter some memo text</p> <p>51. Click Save</p> <p>52. Enter the name of the memo “Letter1.docx”</p>
<p>Notice that we have been unable to save the memo, this is because the Memo Date column we create is mandatory and we haven’t filled it in.</p> <p>The Document Information Panel allows a user while in the rich Office client of Word to associate the document with the appropriate metadata. The metadata we defined in the content type is automatically provided to Word including any restrictions such as mandatory elements.</p>	<p>53. Enter From</p> <p>54. Enter or choose a Memo Date</p> <p>55. Enter “Company” as the Audience</p> <p>56. Click Save</p> <p>57. Enter the name of the memo “Letter1.docx”</p> <p>58. Close Word</p> <p><i>Note: The browser refreshes, if not, you will need to refresh it.</i></p>

Messaging	Actions
Creating a custom Document Information Panel	
<p>Now we have provided the users with a much more structured idea of the content that should be placed in the Compliance document library as well as the metadata that we require of them.</p> <p>The Document Information Panel provides a great way of integrating the metadata and associated rules between SharePoint and Office. The Document Information Panel is actually a Microsoft Office Info Path form and as such we are able to do a lot more with regards to design, web service integration and validation.</p> <p>Let's have a look at basic customisation of the Document Information Panel.</p>	<ol style="list-style-type: none"> 59. Using Site Actions, select the Site Settings link 60. Choose the Site content types option from the Galleries menu 61. Choose the "Compliance Correspondance" content type link to get to the setting page 62. Choose the "Document Information Panel settings" link 63. Under Document Information Panel Template, click "Create a new custom template"
<p>This load up Microsoft Office Info Path 2007 and automatically creates the base Document Information Panel based on the defined Site Columns.</p> <p>Lets do some basic cosmetics, let's remove the Title column, change the background colour and add a small company logo.</p>	<ol style="list-style-type: none"> 64. Click on the box area around the Title column and press Delete 65. Under the Format menu choose Background Color... 66. Change the background colour to Yellow 67. Place the cursor at the start of the columns, and click insert Picture Clip Art 68. Search for Computer and select an image and resize to appropriate proportions. 69. Save the form "Compliance Correspondance.xsn" 70. Choose Publish from the File menu 71. In the Publishing Wizard, choose the "As a Document Information Panel template for a SharePoint site content type or list content type" and click Next 72. Click Publish 73. Close Info Path

Messaging	Actions
	<p>74. Click the “Go back to the Document Information Panel settings page” link</p> <p>75. Tick the “Always show Document Information Panel on document open and initial save for this content type” option.</p> <p>76. Click OK</p>
<p>Let’s have a look at the new Document Information Panel in the existing Memo.</p>	<p>77. Navigate to the Compliance document library and click on the Letter1.docx document</p> <p>78. Show the new Document Information Panel then close Word.</p>
Creating a more complex custom Document Information Panel	
<p>This is all good but my users will get sick of having to enter their name, the audience and the date of the memo, so let’s make it a bit easier for them.</p> <p>Microsoft Office Info Path 2007 has some really good productivity tool inbuilt, especially when it comes to setting default values.</p>	<p>79. Under the Tools menu, choose Default Values...</p> <p>80. Using the dialog, navigate to the Properties for From, Memo Date</p> <p>81. Set the From field to a default value of dc:creator</p> <p>82. Set the Memo Date field to a default value of now</p> <p>83. Click OK</p>
<p>We are also going to set the format of the Memo Date to be more readable.</p>	<p>84. In the properties section, change the bindings format to a more acceptable date format.</p> <p>85. Click OK</p> <p>86. Click OK</p>
<p>Another highly useful productivity capability of Info Path is the ability to change the control type. In this example we are going to change the Audience column from a text entry to a drop down list box.</p>	<p>87. Right mouse click the Audience field and choose Change To Drop-Down List Box</p> <p>88. Right mouse click the Audience field and choose Drop-Down List Box Properties...</p> <p>89. Add three options;</p>

Messaging	Actions
	<ul style="list-style-type: none"> - Company - HR Dept - IT Dept <p>90. Click OK</p>
<p>We now need to save the new Document Information Panel and republish to the SharePoint environment.</p>	<p>91. Save the form "Compliance Correspondance.xsn", overwrite the existing file</p> <p>92. Choose Publish from the File menu</p> <p>93. In the Publishing Wizard, choose the "As a Document Information Panel template for a SharePoint site content type or list content type" and click Next</p> <p>94. Click Publish</p> <p>95. Close Info Path</p> <p>96. Click the "Go back to the Document Information Panel settings page" link</p> <p>97. Click OK</p>
<p>Let's have a look at the new Document Information Panel in the new Memo.</p>	<p>98. Navigate to the Compliance document library and click on the New button</p> <p>99. Show the new Document Information Panel</p>
<p>As you can see the users name and todays date have been automatically populated. Let choose Company from the drop down list.</p>	<p>100. Choose "Company" from the Audience drop down list</p> <p>101. Do not save, just close Word</p>