



Republic Mortgage Insurance Company

Using My Sites for Collaboration User Guide



INSTRUCTOR GUIDE

Using My Sites for Collaboration
User Guide
Created By: Training & Development
For All RMIC Associates
Last Updated: July, 2005

Preparing for Class

Co-Facilitator

Because this class covers collaboration techniques, you will require the assistance of a co-facilitator. The role of the co-facilitator is to participate in a number of the task demonstrations and to act as an exercise partner should there be an odd number of participants in the class.

Exercise Partners

A number of the exercises require that participants work in pairs. Before class begins, each student will need to be assigned an exercise partner to work with.

Class Materials

- Agenda Poster
- Collaboration Flow Poster
- Class Roster
- Instructor Guide
- Collaboration Overview Presentation

Participants have been instructed to print the User Guide and bring them to class. Note that all class exercises are included in the User Guide

Electronic Files Needed for Class

All electronic files are located on the My Sites – Associate Training Workspace in the Practice Files folder. All practice files should be uploaded into the Private Document Library on the Teacher MySite

Training Room Set Up

- Turn on all PC's but DO NOT log in
- Use the Instructor PC in the Training Room rather than your laptop
 - PC login name: teacher
 - Password: teacher1
- Put up posters
- Verify that all PC's are running Office 2003 application suite.

Before Class Begins

Instruct the participants to logon to the classroom PC's using their network logon ID and Password.

After the Class

- Log out of all classroom PC's
- Remove any shortcuts from the Desktop

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Module

1

Introduction and Overview

Time: 10 minutes

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This module will be covered using the Collaboration Overview Presentation as the visual. The class agenda is the second slide. Point out that there is a detailed agenda on the wall.

Set audience assumptions: 1) All participants have attended the Introduction to MySites Training. 2) All participants currently collaborate on documents, files, and/or reports. 3) All participants are proficient in Microsoft Word 2003.

What is Collaboration?

Slide 3 of the presentation covers the definition of collaboration.

If one person had all of the required knowledge to perform a task, there would be no need for teams. In addition, if the only purpose of a team was to gather the input of all the members, that could be accomplished by one individual collecting information from multiple sources and then summarizing them. The true value of teams is through shared creation or synergy. Effective team collaboration is a three-step process of collecting, integrating and then building on individual inputs.

Input: Each team member brings their individual knowledge and experience. This can be done in either a synchronous or asynchronous environment. Note that when time is at a premium, asynchronous processes are more efficient.

Integration: Once knowledge has been shared, the information must be integrated and shared with the entire team. Keep in mind that integration is not summarizing, integration involves finding out how all in individual inputs fit together. Once again integration can be done synchronously or asynchronously.

Synergy: The third and most important phase involves a collaborative team effort that is based on iterative feedback loops among the team members.

Current Collaboration at RMIC – Page 4 – User Guide

Slide 4 in the presentation. This information was covered during the Introduction class. Quick review of the improved productivity associated with virtual collaboration.

Each RMIC associate has a secured “usersub” on the network. This folder is used to store working documents and confidential files. Since no other RMIC associate has access to another individual’s usersub, collaboration cannot take place on the documents or files stored there.

Each department at RMIC has a secured network drive. Files stored on a network drive can be used within a single department for collaborating on files.

Finally RMIC has a corporate common network drive that allows users to share unsecured files among cross-functional teams and department.

Another means for sharing documents within cross-functional teams is corporate e-mail. Associates often email a document to one or more individuals for collaboration. Those who receive the document usually save to their individual usersub, make edits and/or comments, and e-mail the modified document back to the sender. It is then up to the owner to merge all of the changes.

The distribution of printed documents is another way that RMIC associates collaborate. Document owners may ask for feedback from collaborators and mark up copies of the printed materials. The document owner must then merge the changes and repeat steps as necessary until the document is finally approved.

There are a number of challenges and disadvantages associated with RMIC’s current means of collaboration. Specifically:

- There is a risk of duplicate files in multiple locations
- There is a risk of users accessing an old version of a document when a newer version is available
- File shares and email boxes may contain unusable out of date information
- Files stored on a user’s desktop are not backed up on tape
- Email attachments are not searchable and fill up email boxes
- Merging changes into a new version of a document is time consuming and cumbersome

- Using a keyword search for documents within Windows Explorer does not filter out PC system files and cannot search against multiple sources at one time
- If a user's employment is terminated, any folder they created on a network drive must be manually deleted
- It is impossible for users from different departments to collaborate on a confidential document with the use of email attachments
- Collaboration with printed materials is a waste of paper and merging changes is very time consuming and tedious

Microsoft SharePoint technology has the capability to address these challenges and provide RMIC associates with more productive and effective means of collaboration. Specifically, SharePoint allows for:

Slide 5 reviews some of the specific features of Sharepoint that allow for efficient collaboration.

- Uniformity of disk space each user is allotted for personal file storage
- Information is organized in one site and is accessible by anyone in the company unless secured by the MySite owner
- Document management and collaboration is streamlined through one system (AI)
- MySites are indexed and backed up nightly with the rest of the Associate Intranet
- The need for manual administration of MySites is minimal
- MySites doesn't restrict document file size (vs. email attachments), but a site-wide quota of 100MB is enforced
- Certain file formats are restricted from being uploaded such as mdb (Access), mp3, or scripts that could potentially be viruses

Other Benefits to Virtual Collaboration

Slide 6 in the presentation. Credit the book "Virtual Teams That Work" by Cristina Gibson with the information contained in this section. Also point out that using virtual collaboration during the input and integration phase allows individuals to focus on true collaboration during face-to-face meetings rather than wasting meeting time performing knowledge transfer.

In addition to the features and functionality of Sharepoint, there are a number of other advantages to collaborating virtually. Specifically:

- The bringing together of representatives from numerous locations
- If diverse intelligence is leveraged, better outcomes that one person could achieve alone

- More equal representation of all team members
- Relationship conflicts are more likely to be filtered out of computer-mediated communication
- Meetings are more effective when Input and Integration has already taken place.

Getting Started

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This section is also covered in the Introduction class – and is worth repeating in this class. The goal is to have participants begin to think about what files they collaborate on and how they utilize their electronic files.

When working with documents within your **MySite**, you will want to think about how you utilize your files. Consider the following:

- Will other associates need to view this document?
- Will other associates need to edit this document?
- If someone is looking for this file, will they be able to easily locate it?
- Is this file updated on a regular basis?
- If so, do I need to keep a history of previous versions?
- Is this file associated with a short or long term project?
- How long will I need to keep an electronic copy of this document?

The way you answer these questions will affect how you set up your Document Workspaces and manage your files.

Exercise 1.1

Page 7 in the User Guide. Allow 2-3 minutes for this exercise. The purpose of this activity is to give the participants a chance to think about and plan their next collaboration.

In the space below, list types of documents, files, reports, etc. you would collaborate on with others to complete.

Page 8 – User Guide
20 minutes

Module

2

Creating a Document Workspace

A Document Workspace is a separate page on your MySite that is dedicated to collaboration on a single document. Within a Document Workspace you can view and edit the document, share the document with other associates, assign tasks associated to the document and provide links to resources related to the document.

Explain that your Document Workspaces will display on your Public View of your MySite. Demonstrate with the Teacher MySite by clicking on the Public View link on the left side of the screen.

Create a Document Workspace from within MySite

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All of your business documents should be saved to one of your private document libraries on your MySite. By default your MySite has two document libraries: Private Documents, and Shared Documents. All files in your Private document library can be accessed only by you. All files in your Shared Document library can be accessed by any RMIC Associate.

For documents that require collaboration with other associates, you will create a separate space on your MySite called a **Document Workspace**. Once you have created the Workspace, you will add **Members**. Workspace Members are those associates who you will be collaborating with on your document.

Before you create the Document Workspace, you must first create the document and save it into your Private Document Library on your MySite.

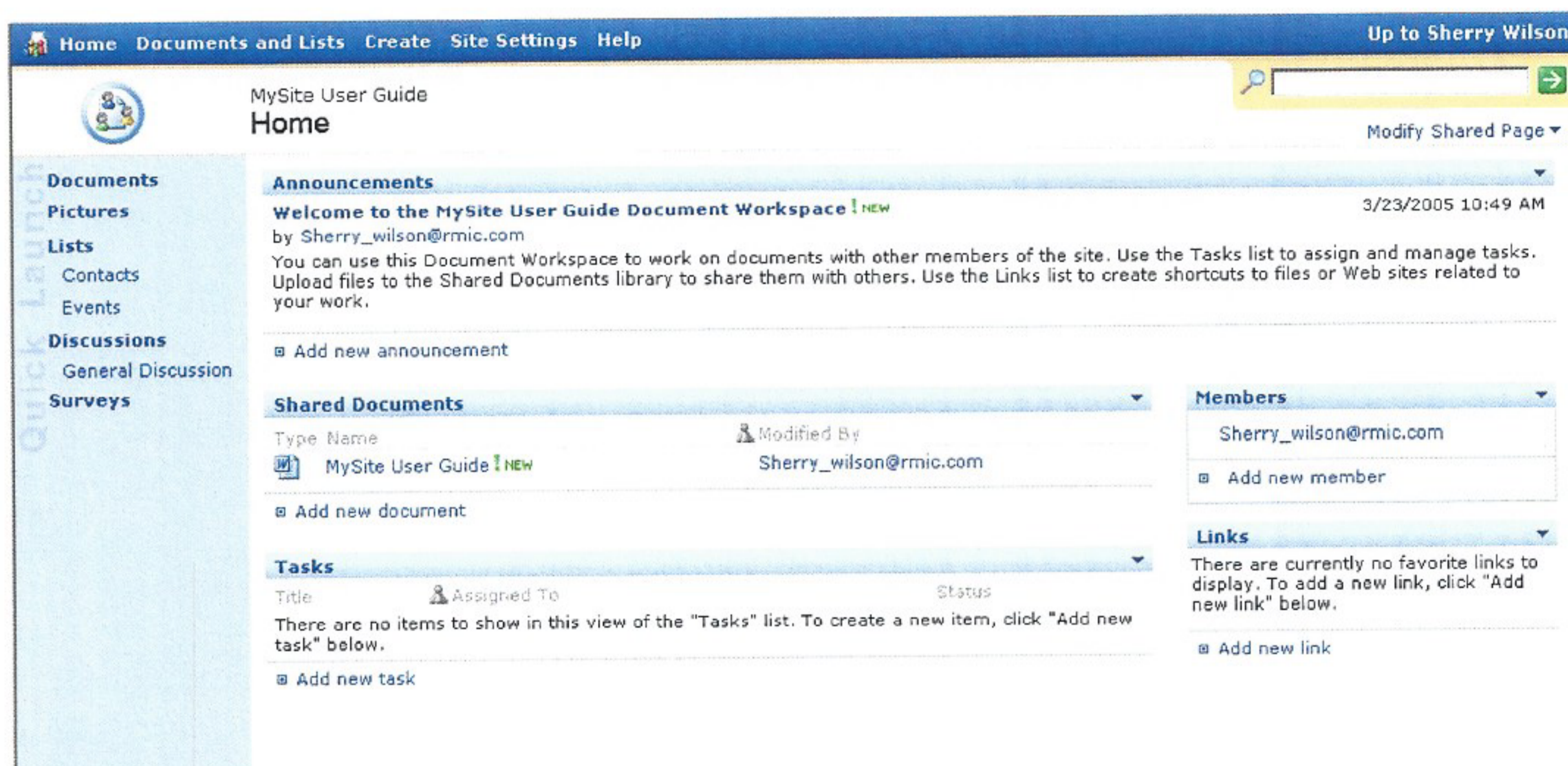
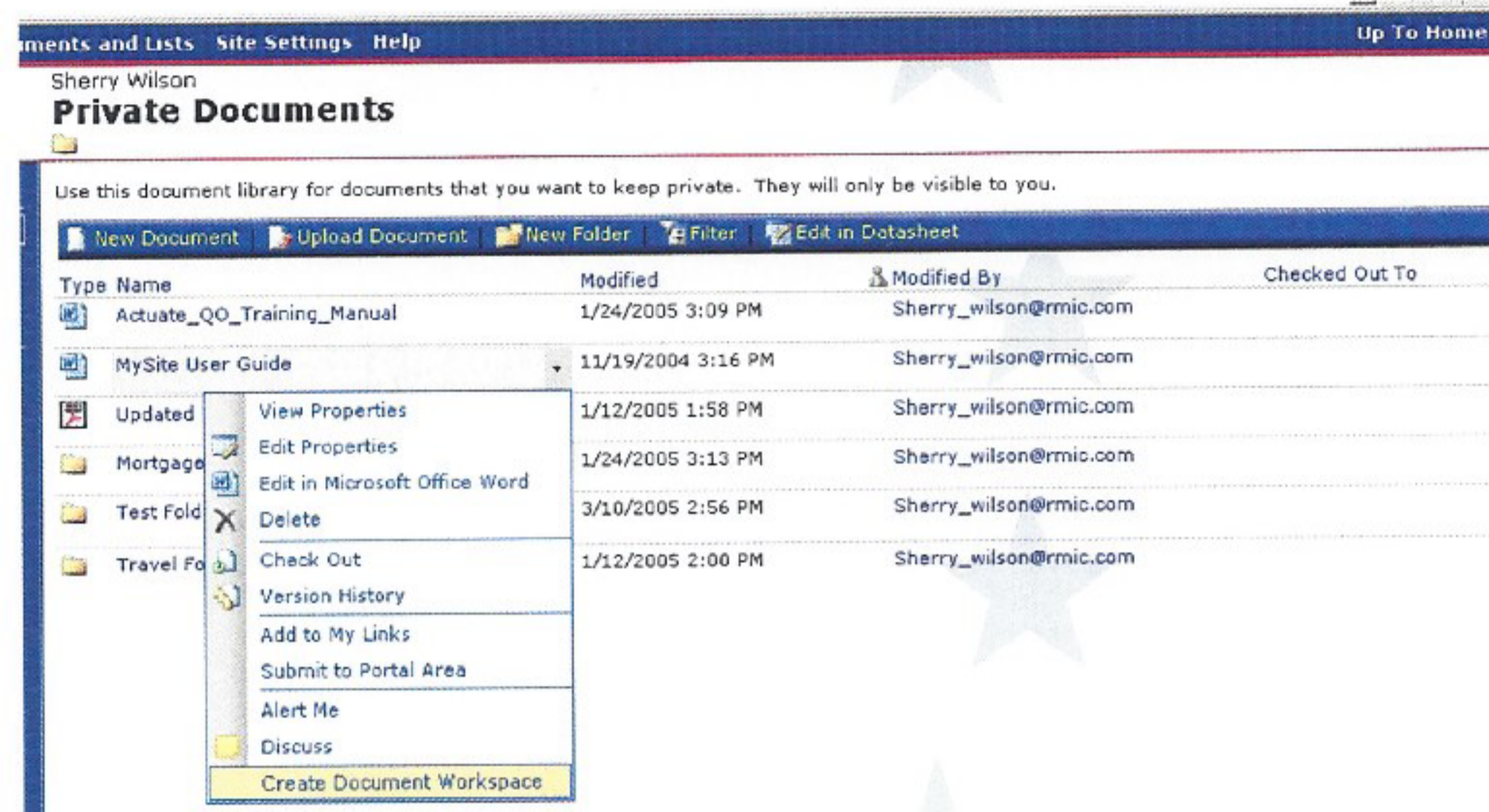
Reiterate that you save into your Private Document library not your Shared Document Library.

Use the file “budget 2006.xls” that was loaded into the Teacher Private Document Library as your example. The instructor will demonstrate this set up from the Teacher PC.

The co-facilitator will also be performing these steps from their laptop so that the Instructor can demonstrate both sides of collaboration – being the document owner and being the one with whom a document is shared.

To create a Document Workspace, complete the following steps:

1. Navigate to and open the Document Library that contains the file that you want to share.
2. Move your cursor over the name of the document to display the smart tag.
3. Click the dropdown arrow and select **Create Document Workspace**.
4. When the Create Document Workspace page displays, click **OK**.
5. SharePoint then automatically creates a new page on your **MySite**. This page is your **Document Workspace**.

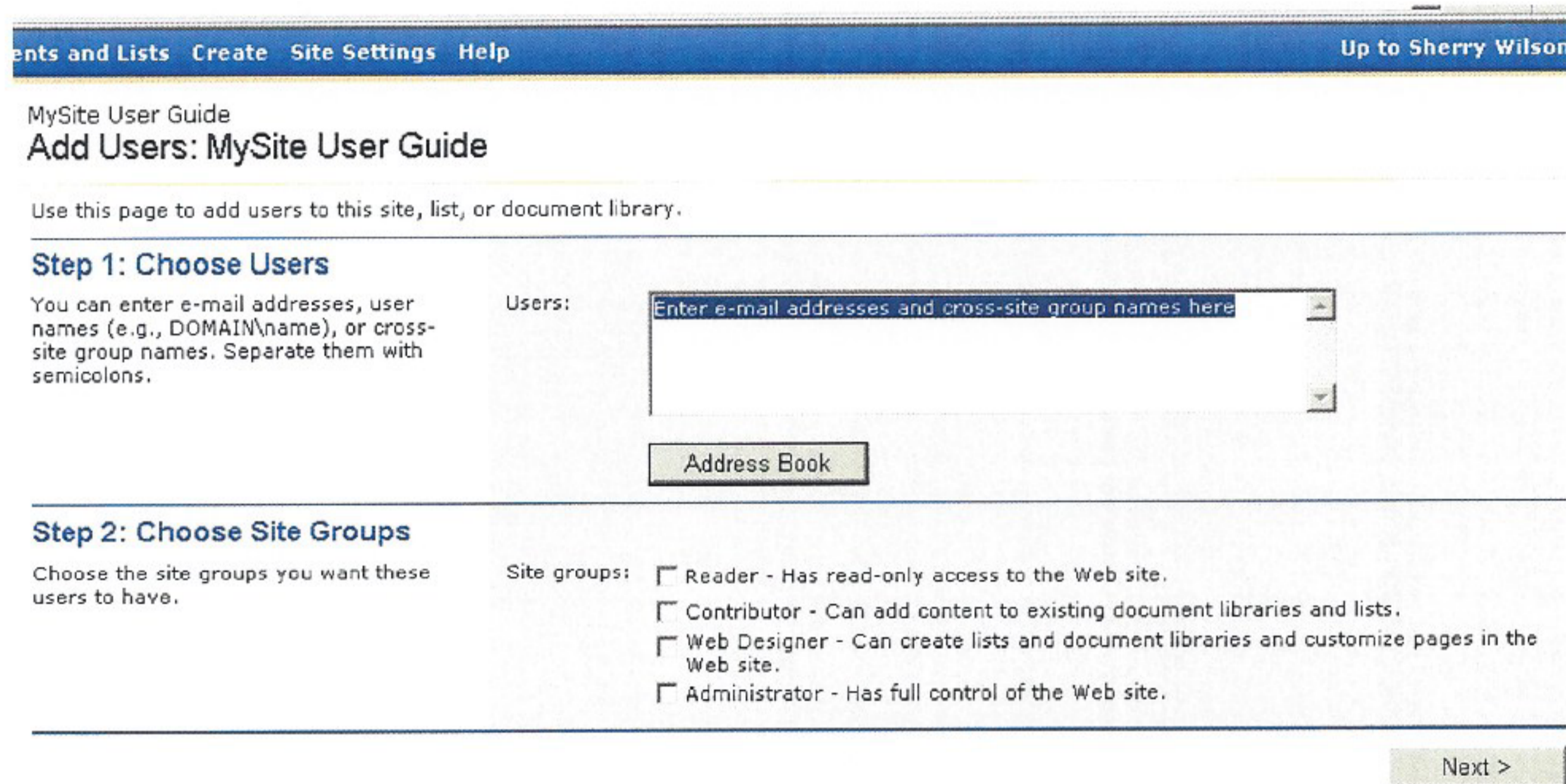


- Document Workspaces are all created using the same template. You will see that there are a number of Web Parts that display. You can utilize these Web Parts to assign tasks, post announcements and add links. There is also a Web Part titled **Members**. Click the “**Add new member**” link to grant another associate access to the workspace.

Add your co-facilitator as the member to your workspace.

Add the Instructor as the member to your workspace.

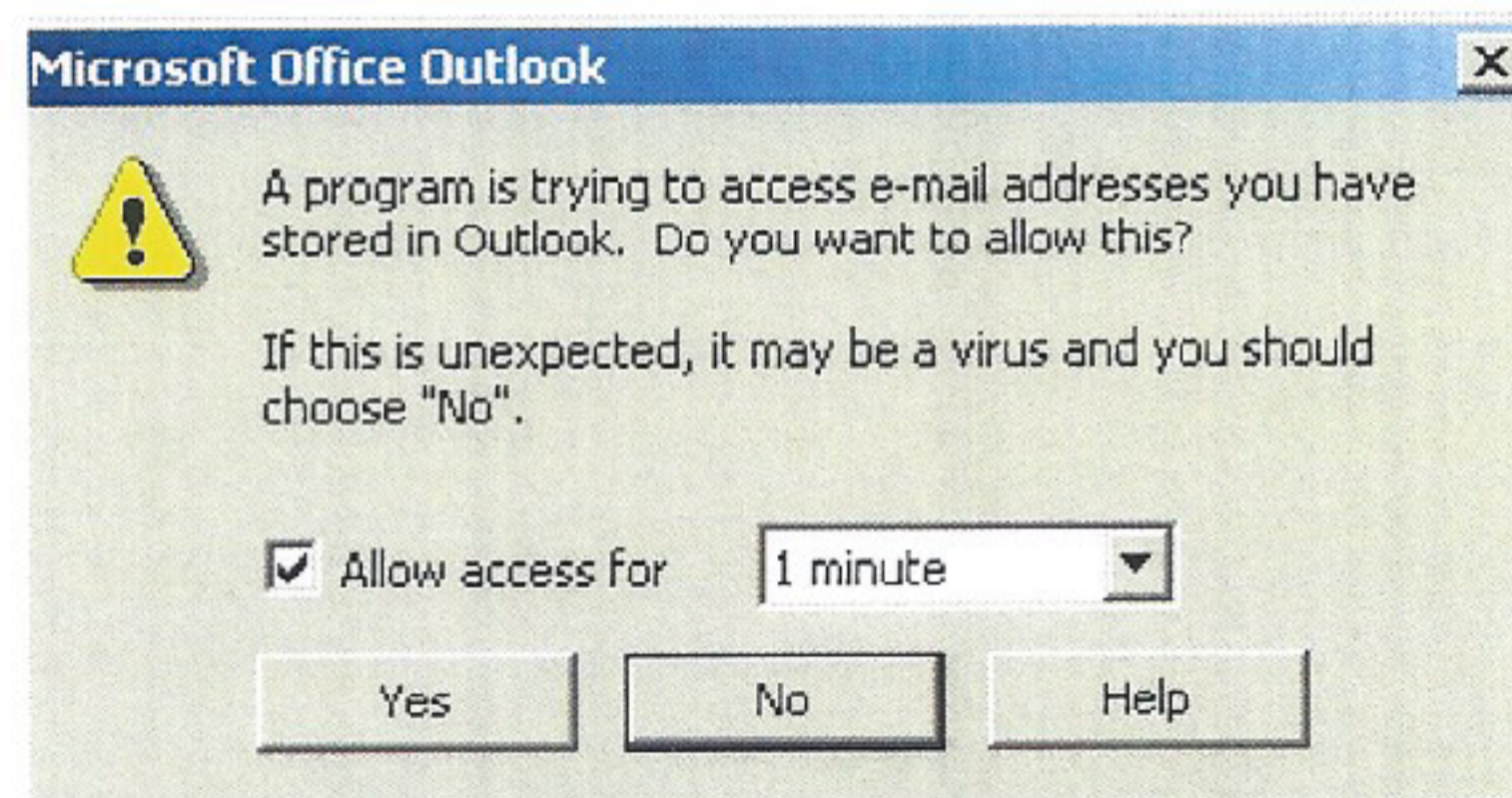
- In the **Choose Users section**, enter in the email address(s) of the users that you want to grant access to in the “Users” field. Note that you can also click the **Address Book** button and browse the corporate contact list for the user name.



- In the **Choose Site Groups section**, click the appropriate checkboxes to indicate what type of access you are granting the user.

- Click the **Next** button.

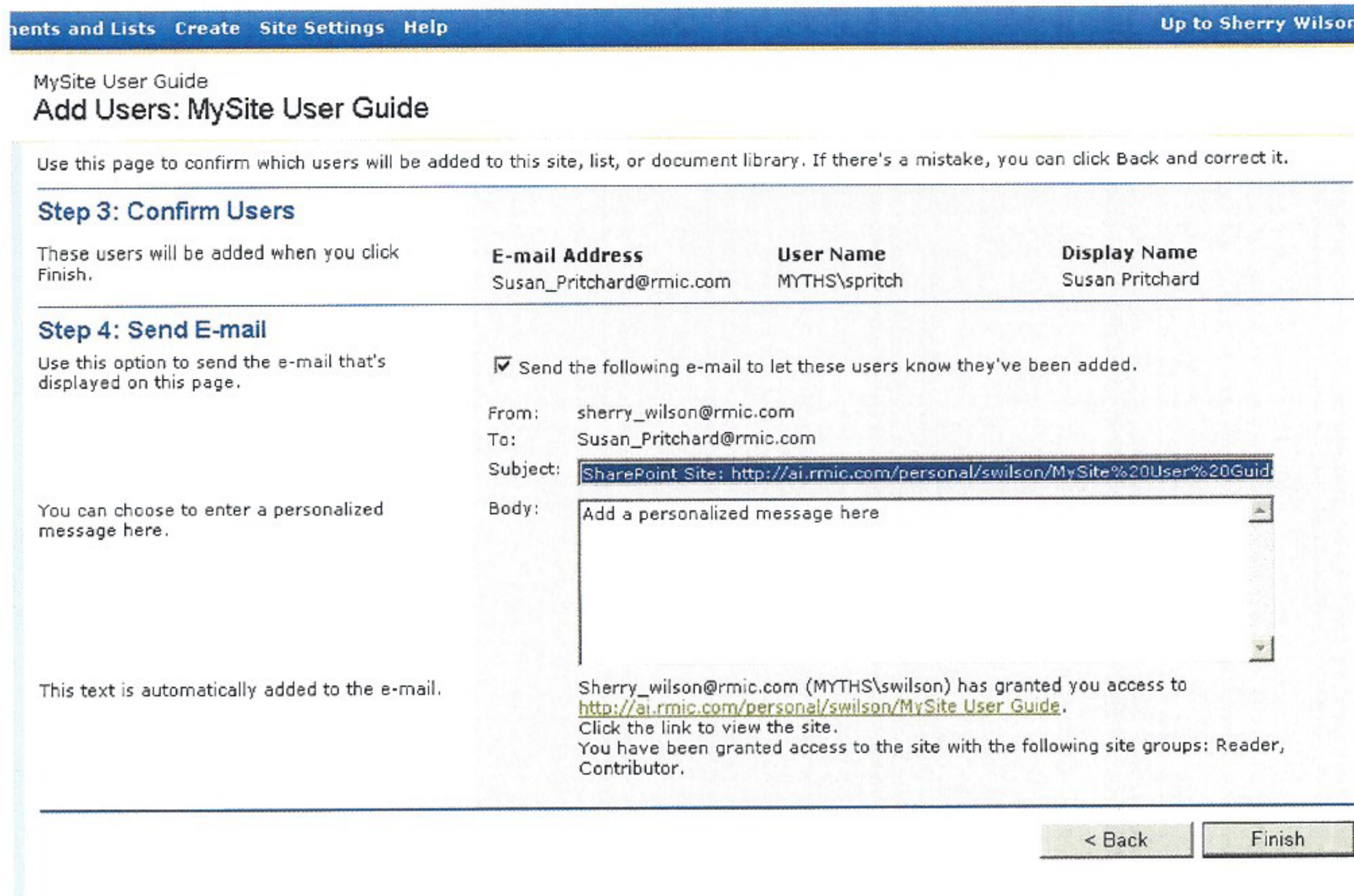
- If the Microsoft Outlook dialog box displays, click the checkbox to “*allow SharePoint to access the Exchange server*”.



- Click **Yes**.

- When the next screen displays, look at Step 3 to verify that you added the correct users.

- By default, SharePoint will send an e-mail to those individuals that you have granted access. Type in a short message in the “Body” field.



- Click **Finish**.

The email the users will receive will contain a link to the Document Workspace. Ideally, the users will then add the link to the **Links** section on their own MySite.

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Explain that we will complete this exercise as a class. The instructor will guide the participants through verbal instructions and PC demonstration.

Exercise 2.1

In this exercise you will create a document workspace in order to collaborate with your manager on your professional development goals for 2006. For this exercise you will only be creating the Document Workspace, you will add members to your workspace in a later exercise.

To begin, create an MS Word document and enter in the following information:

- a. Yesterday's date
- b. Your Name
- c. Your Department
- d. Your Job Title
- e. Three professional goals for 2006

Save the document to your Private Document Library on you're MySite as "*Firstname 2006 Goals*". Create a Document Workspace for the document.

Step-by-Step Instructions

1. Open Microsoft Word and enter in the information as outlined above.
2. From the Main Menu, select File, Save As.
3. When the Save As dialog box displays, click the MySite link.
4. When you document library listing displays, select Private Documents.
5. Click the Save button.
6. In the **Task Pane**, select **Shared Workspace** from the drop down menu.
7. In the "*Document Workspace*" name field, enter 2006 Goals.
8. In the "*Location for new workspace*" field, select **My Site**.
9. Click the **Create** button.

User Guide – p 12
Time: 15 minutes

Module

3

Control Document Versioning

Document Versioning

Indicate the advantages of using version control and encourage the use of this feature for collaboration activities. However, explain file size considerations and space restrictions.

Once you have created a Document Workspace and begin collaborating on files, you may choose to turn on the versioning feature. By utilizing version control you will be able to save copies of files each time they are modified. You also have the ability to view or restore earlier versions. When you first create a **Document Workspace** the versioning feature is turned off. To activate version control, complete the following steps.

1. From within the **Document Workspace**, click the **Shared Document Library** header to open.
2. Under Actions, click "**Modify Settings and Columns**".
3. In the **General Settings** section, click "**Change General Settings**".
4. In the **Document Versions** section, click the **Yes** radio button.
5. Click **OK**.
6. Click **Home** to return to the **Document Workspace**.

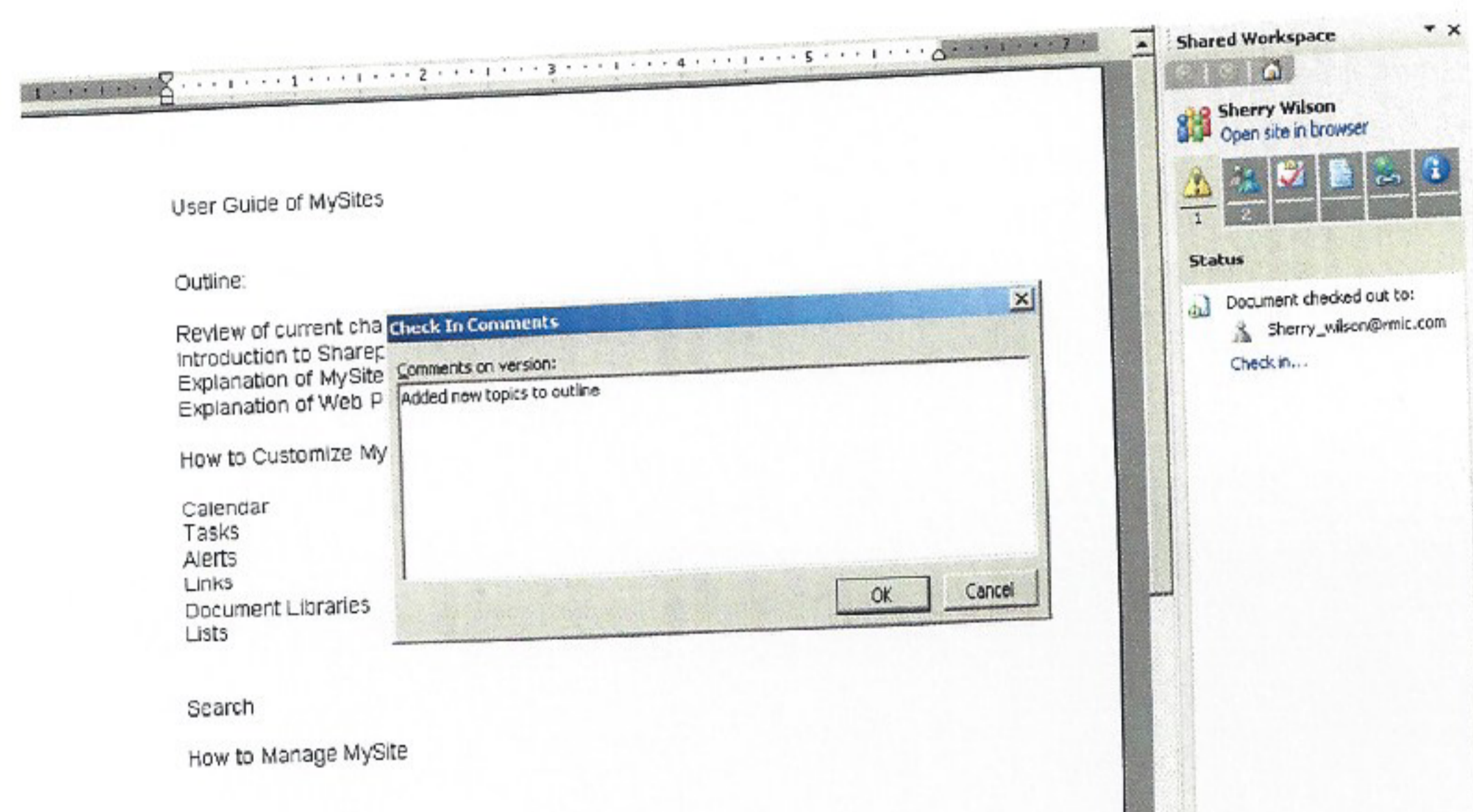
Edit a Shared Document

Page 12 – User Guide

Use the Class Agenda document to demonstrated check-out and edit. Once you have created your Document Workspace and turned on versioning as appropriate, you are ready to begin collaboration. Since multiple individuals will be working on the document, you will “check-out” the document before you begin editing. By performing this function you prevent other users from making changes while you are editing the document.

To check-out and edit a shared document, complete the following steps:

1. Open the Shared Document library.
2. Move your cursor over the document name to display the Smart Tag.
3. Select **Check Out** from the dropdown menu.
4. Your username will then display in the “*Checked Out To*” column.
5. Move your cursor over the document name to display the smart tag.
6. Click the down arrow and select **Edit in Program** from the menu.



Explain “Edit in Program” will display as “Edit in MS Word”, “Edit in MS Excel”, etc depending on the type of file in question.

7. When the file opens, make the necessary changes. When you are ready to save, click the “**Check In**” link located under the **Status** tab in the task pane.
8. When the **Check in Comments** dialog box displays, enter in notes related to the edits.
9. Click **OK**.

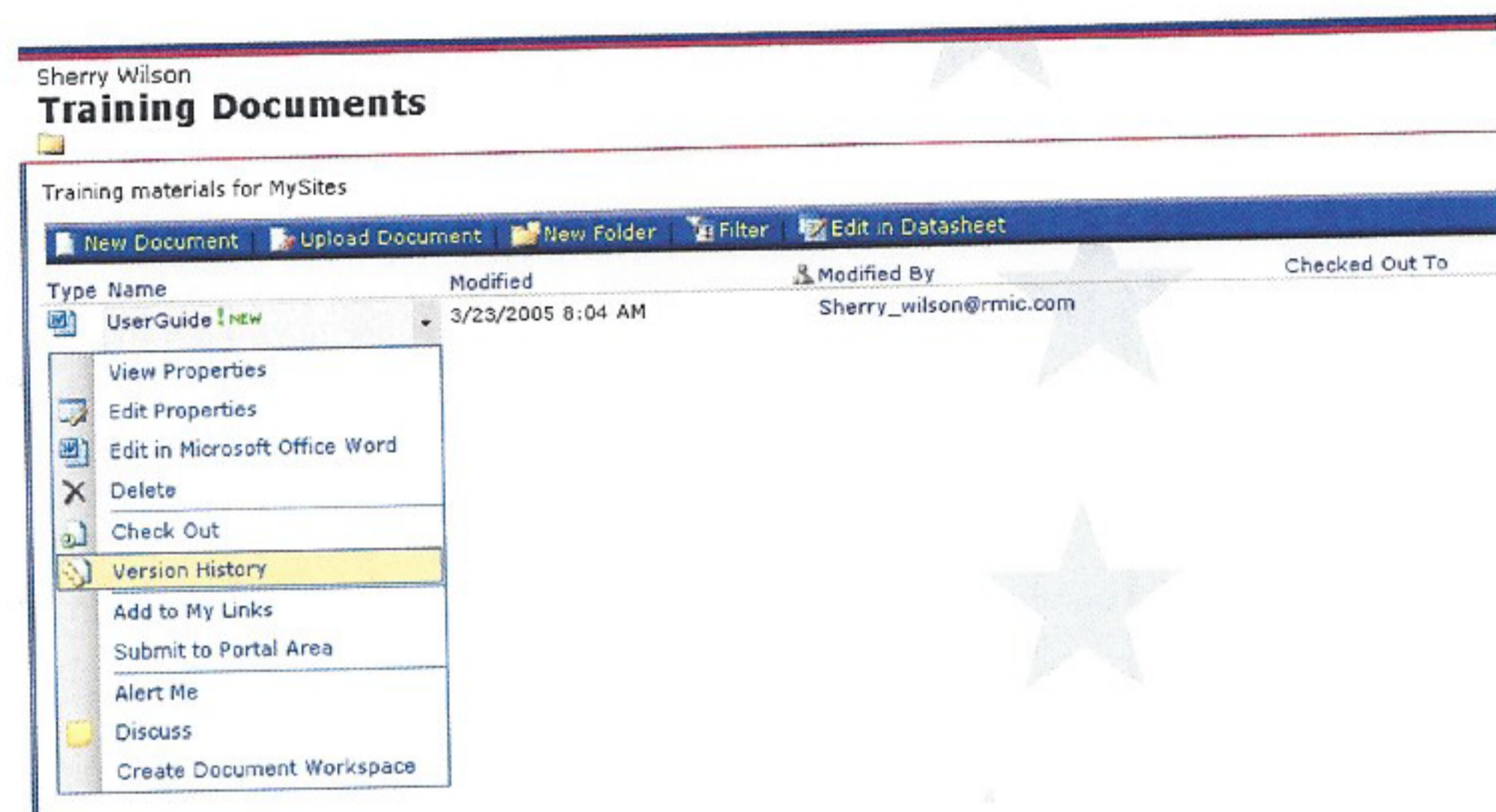
View, Restore, and Delete Document Versions

Use the Class Agenda document to demonstrate working with Version History. Specifically, delete the first version of the document. Also point out that by default the Versions Saved page displays the document versions with the most recent at the top of the list and the oldest version at the bottom.

When versioning is turned on, a copy of the document is saved each time it is opened and edited. Sharepoint allows you to view a **Version History** and select to view, restore and/or delete previous versions of a document.

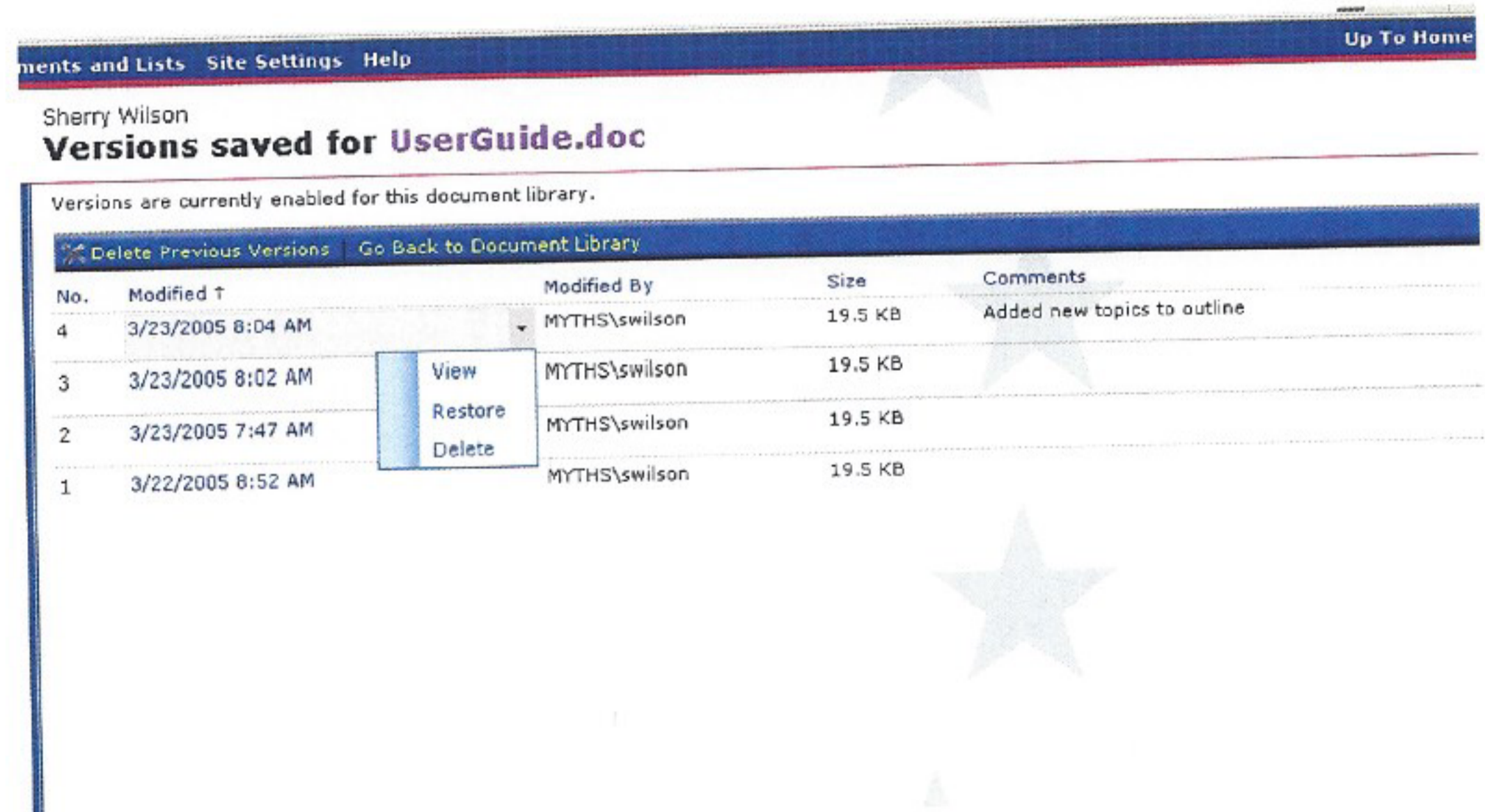
To utilize the **Versions Saved** page, complete the following steps:

1. Navigate to and open the library containing the document.
2. Move your cursor over the document name to display the smart tag.
3. Click the dropdown arrow and select **Version History**.



4. **The Versions Saved** page will display a list of all previous versions of the file. You will be able to view the date and time that each version was saved as well as the comments for each. By default, the most recent version of a file will display at the top of the list.

5. To **View, Restore** or **Delete** a version, move your cursor over the appropriate line to display the smart tag.



6. From the dropdown menu select **View** to open and view the file. Select **Restore** to overwrite changes made after that version was saved. Select **Delete** to delete that version from the system.

Page 15-16 in the User Guide. Exercises 3.1 – 3.3 should all be done together. Allow 5-7 minutes for this exercise. Participants will complete this exercise on their own.

Exercise 3.1

In this exercise you will turn on versioning.

As the year progresses, you anticipate that your goals and/or your strategies for meeting your goals might change. You want to be able to track all of the versions the documents undergoes over the course of the year. To do this, turn on versioning for your 2006 Goals document.

Step-by-Step

1. Open the Shared Document space created in Exercise 2.1.
2. Click the **Shared Document** library header to open.
3. On the left side of the screen, click **Modify Settings and Columns**.
4. Click the **Change General Settings** link.
5. Click the **Yes** radio button in the Document Version section.
6. Scroll to the bottom of the page and click **OK**.
7. Click the **Home** link on the left side of the screen to return to the Document Workspace.

Exercise 3.2

In this exercise you will edit and save the document using the information in the scenario below.

You've spent some time thinking about how you might meet your goals for 2006 and decide that you would like some input from your manager. You decide to add a section to your document entitled "Strategy for Meeting 2006 Goals", and you will ask your manager to enter in his/her thoughts in this area.

When you open the document, you notice the date entered was incorrect. You change the date to reflect today's date. Once you've made these edits, save the document. Make any comments you feel are appropriate.

Step-by-Step

1. Click the Document Library header to open the Shared Document Library on the Workspace.
2. Move your cursor over the "2006 Goals" document.
3. Click the Smart Tag and select "Check-out" from the drop-down menu.
4. Click the Smart tag again and select "Edit in Microsoft Word" from the drop-down menu.
5. When the document opens, change the date to today's date.
6. Add a new section to the document called "Strategy for Meeting 2006 Goals?"
7. Save the document.

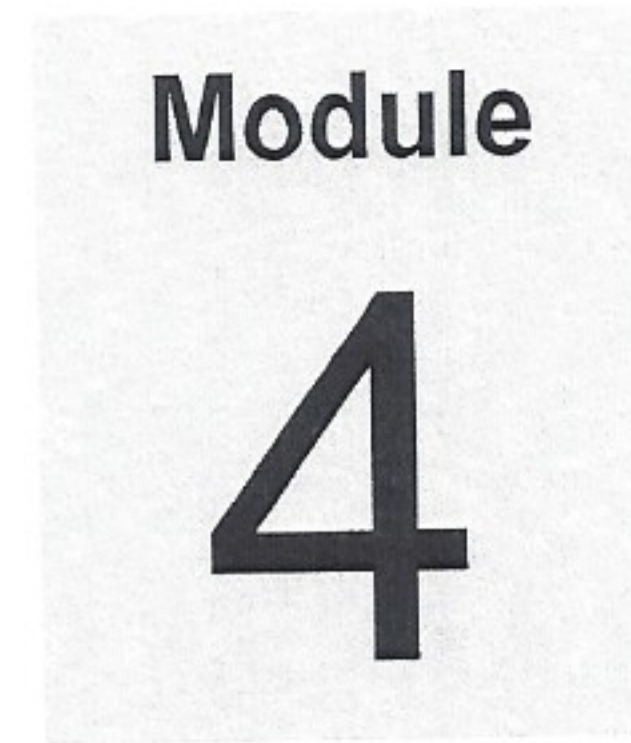
8. In the Task Pane, click the Status tab then click the Check in link to check the document back into the Workspace.

Exercise 3.3

In this exercise you will restore the earlier version of the document based on the scenario below:

Step-by-Step

1. Click on the Shared Document web part header to open the library.
2. Click the smart tag and select Version History.
3. In the version history list, locate the first version of the document. Click the smart tag and select Restore.



Sharepoint Integration with MS Office

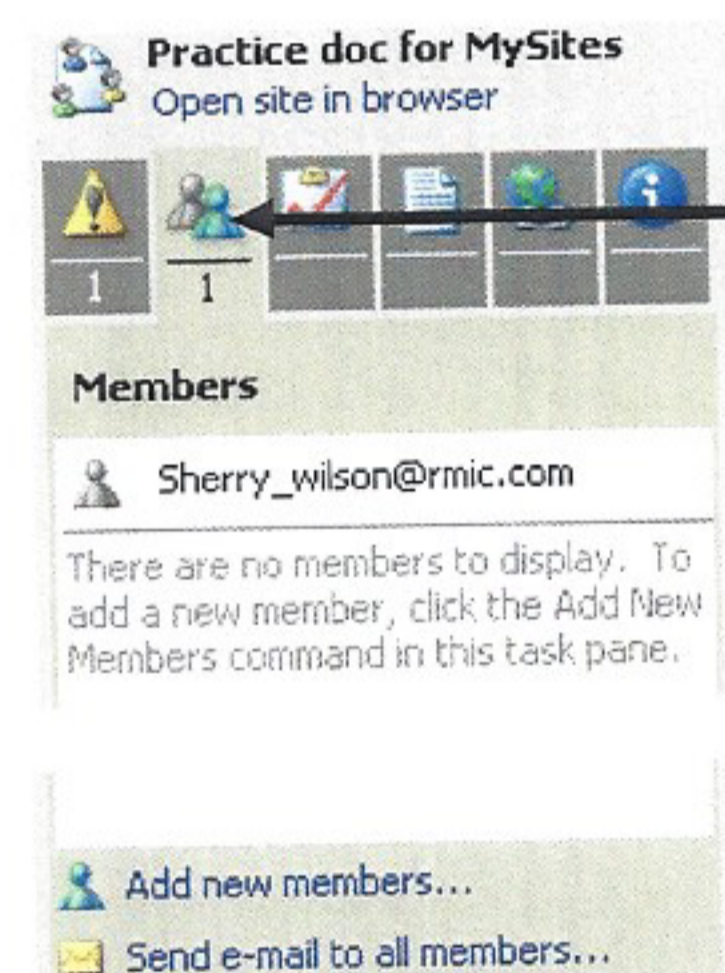
In this section we will look at the collaboration functionality from directly within a Microsoft Application. Most of the functionality is accessed through the Task Pane. Explain and demonstrate how to view and close the task pane. Continue to use the Class Agenda document as the demonstration example.

Microsoft Office applications are directly integrated with Sharepoint Services and **MySites**. From within an MS Office application you can create a Document Workspace, check-in a document, assign tasks, and set up hyperlinks to other resources.

Add a Member to a Document Workspace

To add a member to a Document Workspace, complete the following steps:

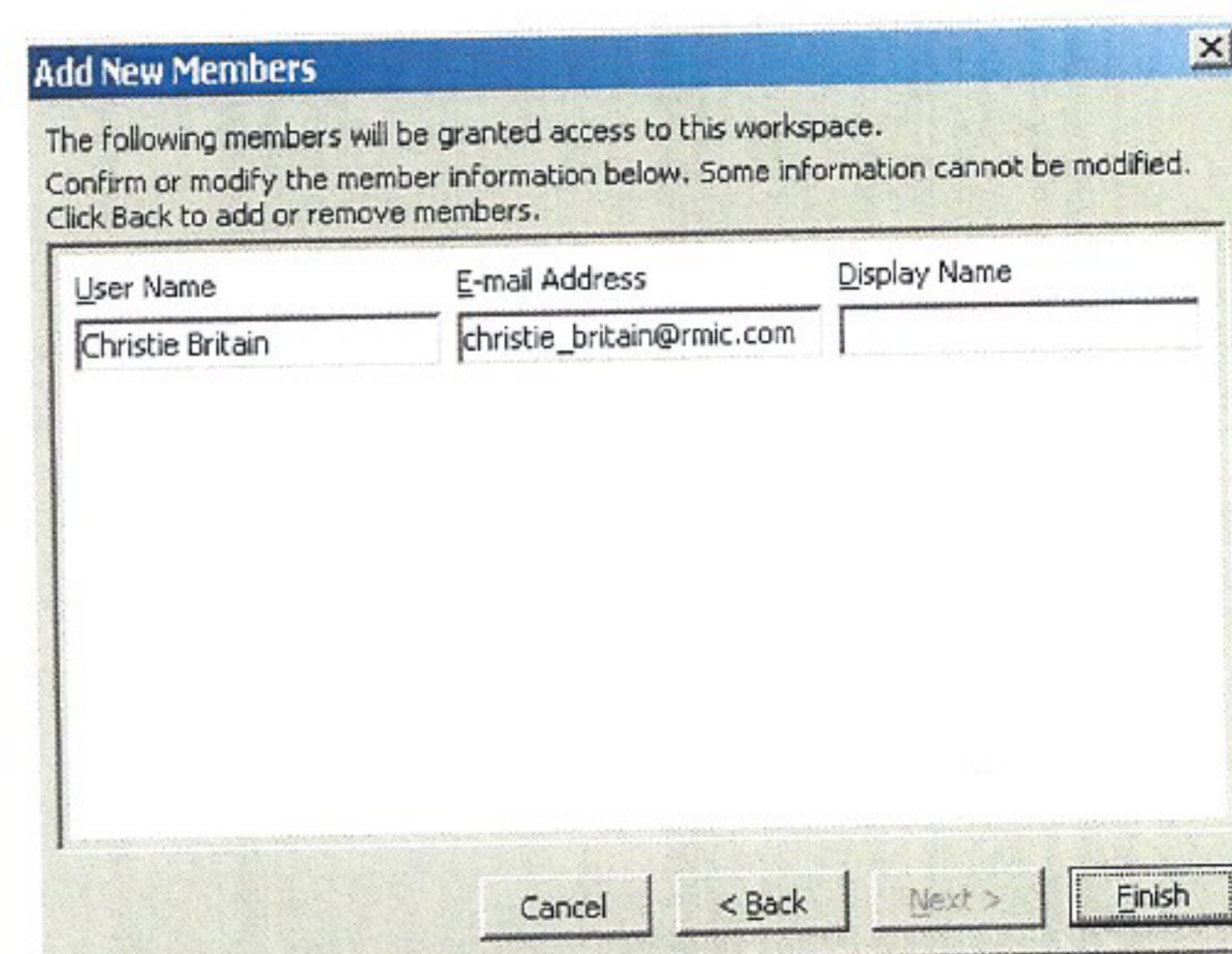
1. In the **Task Pane**, click the **Members** tab.
2. Click the **Add new members'** link.



Members tab

Add co-facilitator as a member

3. Enter in the e-mail address of the appropriate associate.
4. When the **Add New Members** dialog box displays verify the correct associate name is displayed and click **Finish**.



By default all members added will have contributor rights.

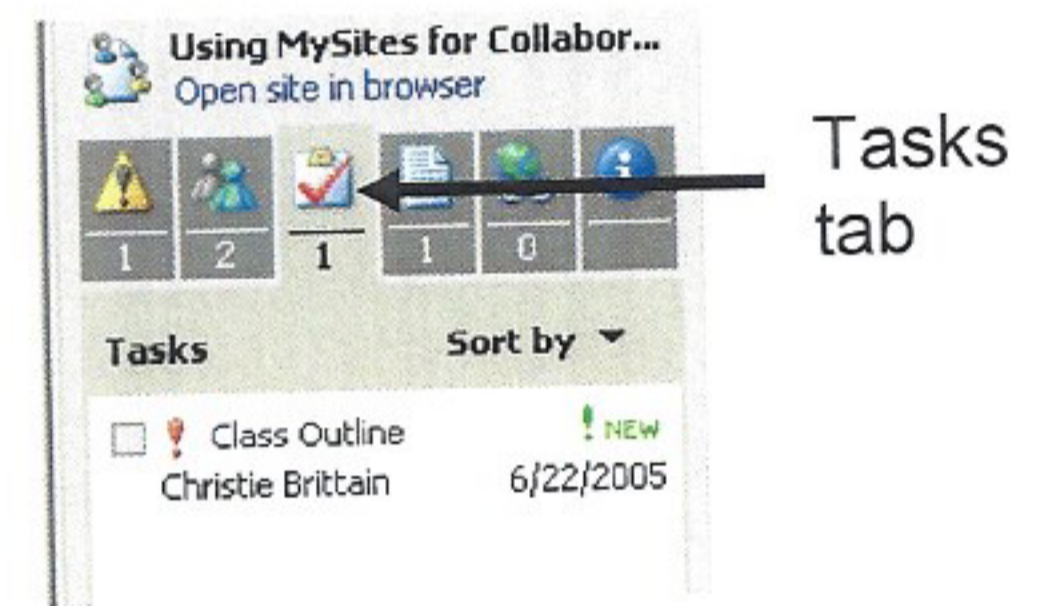
Demonstrate the drop-down menu next to each member name.

Assign a Task

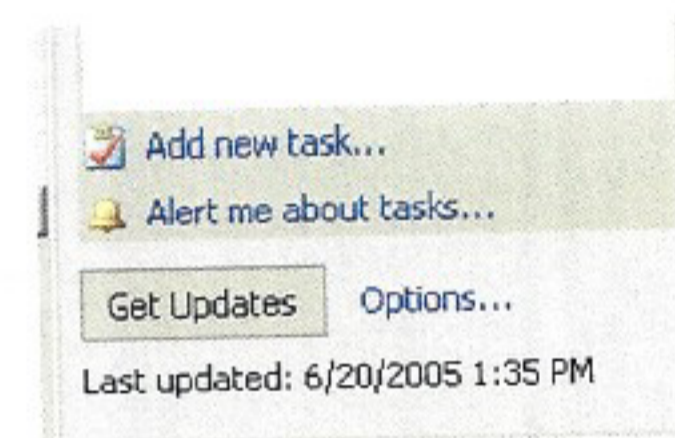
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You can assign tasks related to a document by completing the following steps:

1. In the **Task Pane**, click to select the **Tasks** tab.
2. Click the **Add new task** link.



Add a task for the co-facilitator. Task should be titled, please review and provide sub-topics for each module. Improvise on due date based on the date of the class.



3. In the **"Title"** field, enter in a name for the task.
4. Use the drop-down boxes in the **"Status"** and **"Priority"** fields to select the appropriate status and priority for the task.
5. Use the drop-down box in the **"Assign to"** field to select who is responsible for the task.

6. In the **"Description"** field, enter in comments associated with the task.
7. Use the drop-down boxes in the **"Due date"** field to complete the date that the task is due.
8. Click **OK**.

While the Instructor is demonstrating how to set up a link, the co-facilitator will access checkout the Class Agenda document and complete round one of edits. (See document notes for specifics.) Co-facilitator will then save the changes,

check the document back in and assign a task to the Instructor. The task Title will be Review sub-topics.

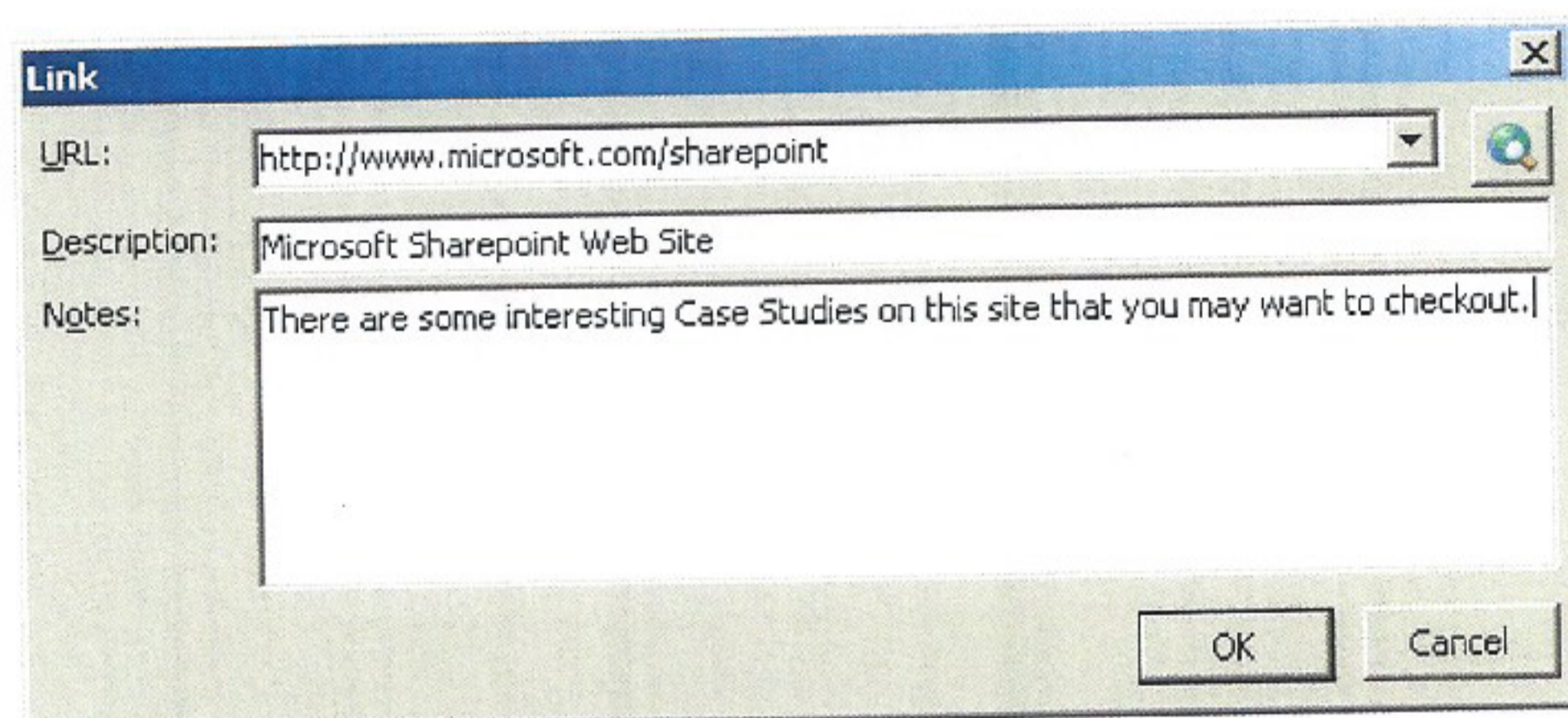
Create a Link

Page 18 – User Guide

Use the Budget 2006 document to demonstrate how to create a link.

There may be occasions when you want to set up a hyperlink to a document workspace. The link may be to either an internal page on the AI or to an external web site. To create a link, complete the following steps.

1. On the **Task Pane**, click the **URL** tab.
2. Click **Add new link**.
3. When the **Link** dialog box displays enter web address in the “*URL field*”.
4. In the “*Description*” field enter in the name of the link.
5. In the “*Notes*” field enter any comments related to the link.
6. Click **OK**.



After demonstrating adding hyperlinks, access the Class Agenda document. Show the participants how the document looks with mark-up and comments. Also point out the new assigned task.

Toggle from the open document to the Document Workspace and refresh the screen. Show how the display updates in real time between changes made through the integration between the document and the workspace

Creating a Document Workspace Through e-Mail Attachments

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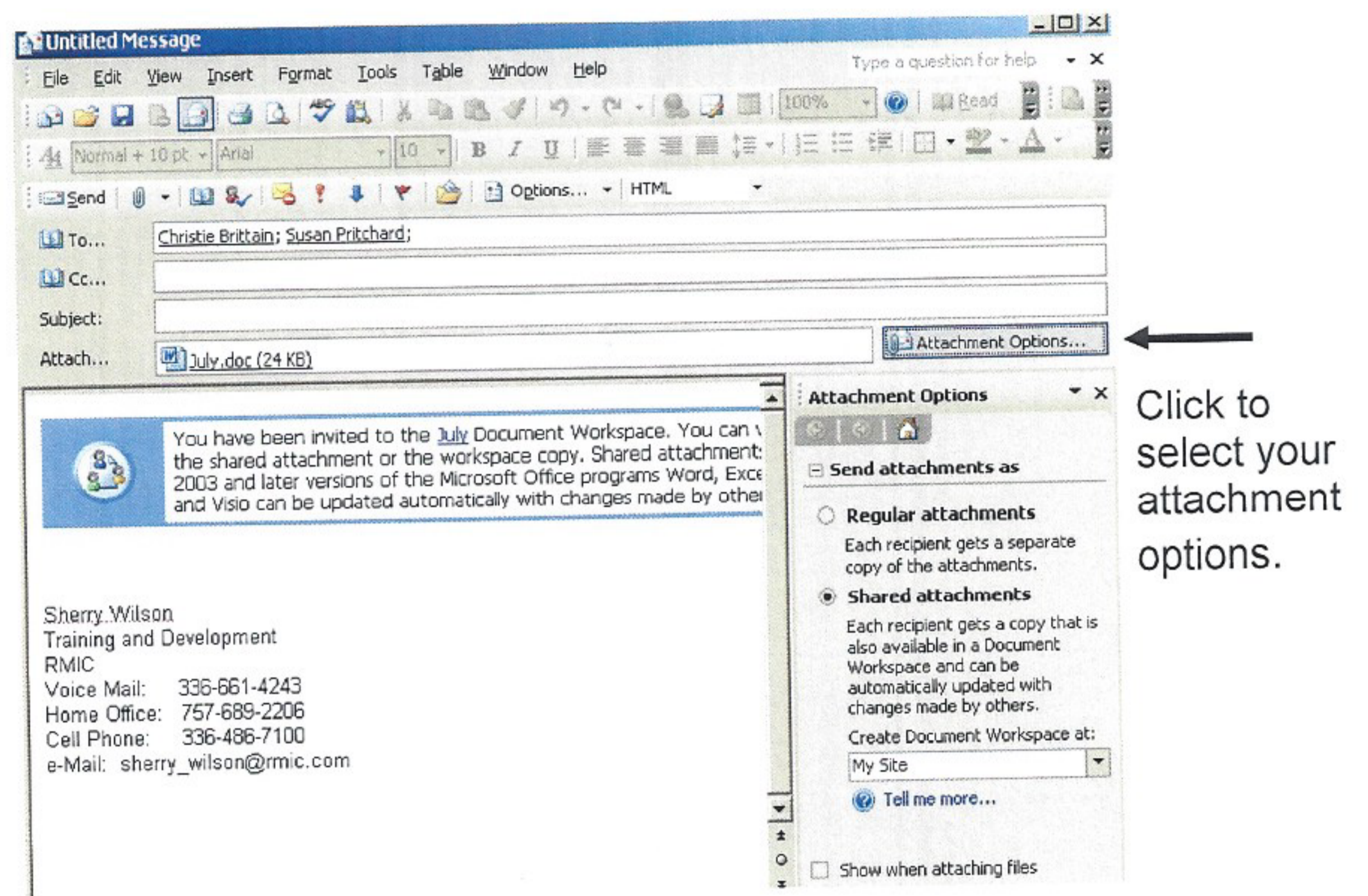
Use the Memo document to demonstrate e-Mail attachments. Point out again that the document should first be saved to the Private Document Library before sending as an attachment.

Co-facilitator will also perform these steps from their laptop. The e-mail should be sent to Teacher.

One of the most useful integration features between Sharepoint and MS Office is the ability to create a Document Workspace as you are sending an e-mail attachment.

Let's say that you are working on a document that you would ordinarily e-mail to other associates in order to obtain their input. You can create the Document Workspace at the same time by completing the following steps.

1. Create and compose your e-mail.
2. Attach the document to the e-mail
3. Click the **Attachment Options** button.
4. Click the **Shared attachments** radio button.
5. Verify that you are creating the Document Workspace at **MySite**.
6. Click **Send**.



As you send the e-mail, Sharepoint automatically creates the Document Workspace on your MySite and adds all of your e-mail recipients as members with contributor rights.

After demonstrating steps for creating the workspace, access the Teacher e-mail to show how the email looks from the receiving end.

Page 20 – User Guide: Exercises 4.1 – 4.3 will all be done together. Allow 10 minutes to complete the exercises.

The class will complete these exercises together as the instructor guides the participants through the steps both verbally and through PC demonstration.

Explain that since e-mail is not configured on the classroom PC's that they will not be able to utilize this feature. Instead, review the searching capabilities of the AI

Exercise 4.1

Exercises 4.1 – 5.2 will involve virtual collaboration. You will be assigned an “exercise partner” who will assume the role of your manager. Likewise you will also assume the role as manager for your partner.

In order for your manager to have the ability to view and make edits to your goals, you will need to give him/her access to the document. Add your exercise partner as a member to the document workspace, giving him/her contributor rights.

Note that by default Sharepoint will automatically send an e-mail to your workspace members. Because MS Outlook is not configured on the classroom PC's do not accept the system e-mail defaults.

Step-by-Step

1. Check out and open your 2006 Goals document.
2. In the task pane, click the **Members** icon.
3. Click the **Add New Members** link.
4. Enter the e-mail address of your exercise partner and click the Next button.
5. Verify that the User Name, Email Address, and Display Name fields have been filled in automatically.
6. Contributor rights are the default setting, accept this default value.
7. Click the Finish button.
8. When the dialog box displays, deselect the checkbox indicating an auto-email will be sent.

Exercise 4.2

In this exercise you will assign a task to the document based on the scenario below.

Since you are asking for specific input related to your 2006 Goals, you will communicate this by assigning a task to your manager. You will create a task with a normal priority level. Use the description field to communicate to your manager you are asking for their input into what strategies they feel you can employ in order to meet your Goals. Enter in 8/1/05 as the due date for the task.

Step-by-Step

1. With your 2006 Goals document open on the screen in edit mode.
2. In the *Task Pane* click the **Tasks** icon.
3. Click the **Add New Task** link.
4. In the "*Title*" field enter Suggestions for Strategies.
5. Use the drop-down box in the "*Assigned to*" field to assign the task to your exercise partner.
6. Enter a due date of August 1, 2005.

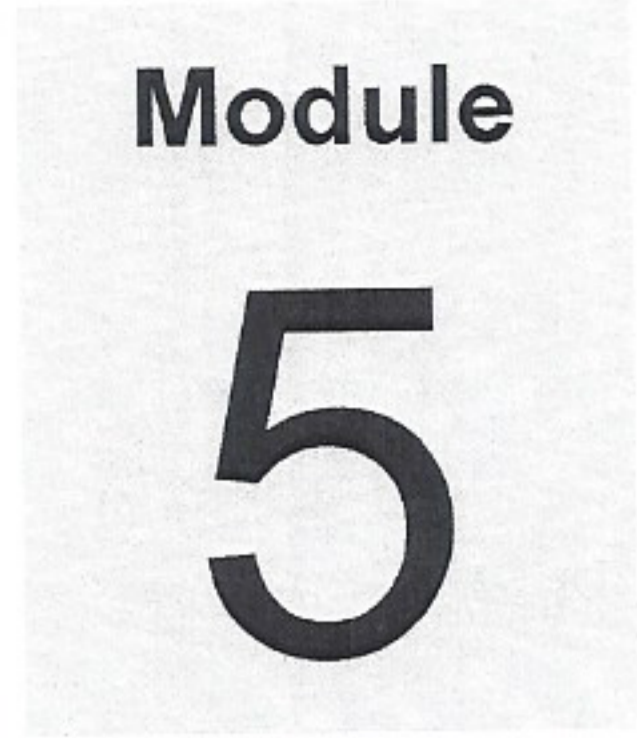
Exercise 4.3

In this exercise you will check-out and edit the document created by your exercise partner based on the scenario below.

You are now assuming the role of manager. You are reviewing the 2006 Goals submitted by your direct reports. Since you expect you will have comments or changes to contribute, you check-out the document before opening it in edit mode. Since you have not been sent a hyperlink to the Document Workspace, you will need to search for the space on the AI.

Step-by-step

1. From the Home Page of the **AI**, conduct a search on your partner's name to locate their **Public Site** and the newly created **Document Workspace**.
2. Click the **Shared Document** header to open the document library.
3. Use the smart tag to display the pop up menu.
4. Select **Check-out** from the drop down list.
5. Use the smart tag to display the pop up menu.
6. Select **Edit in MS Word**.
7. When the document opens, enter in some ideas on how the associate can meet their professional development goals.



Reviewing a Document

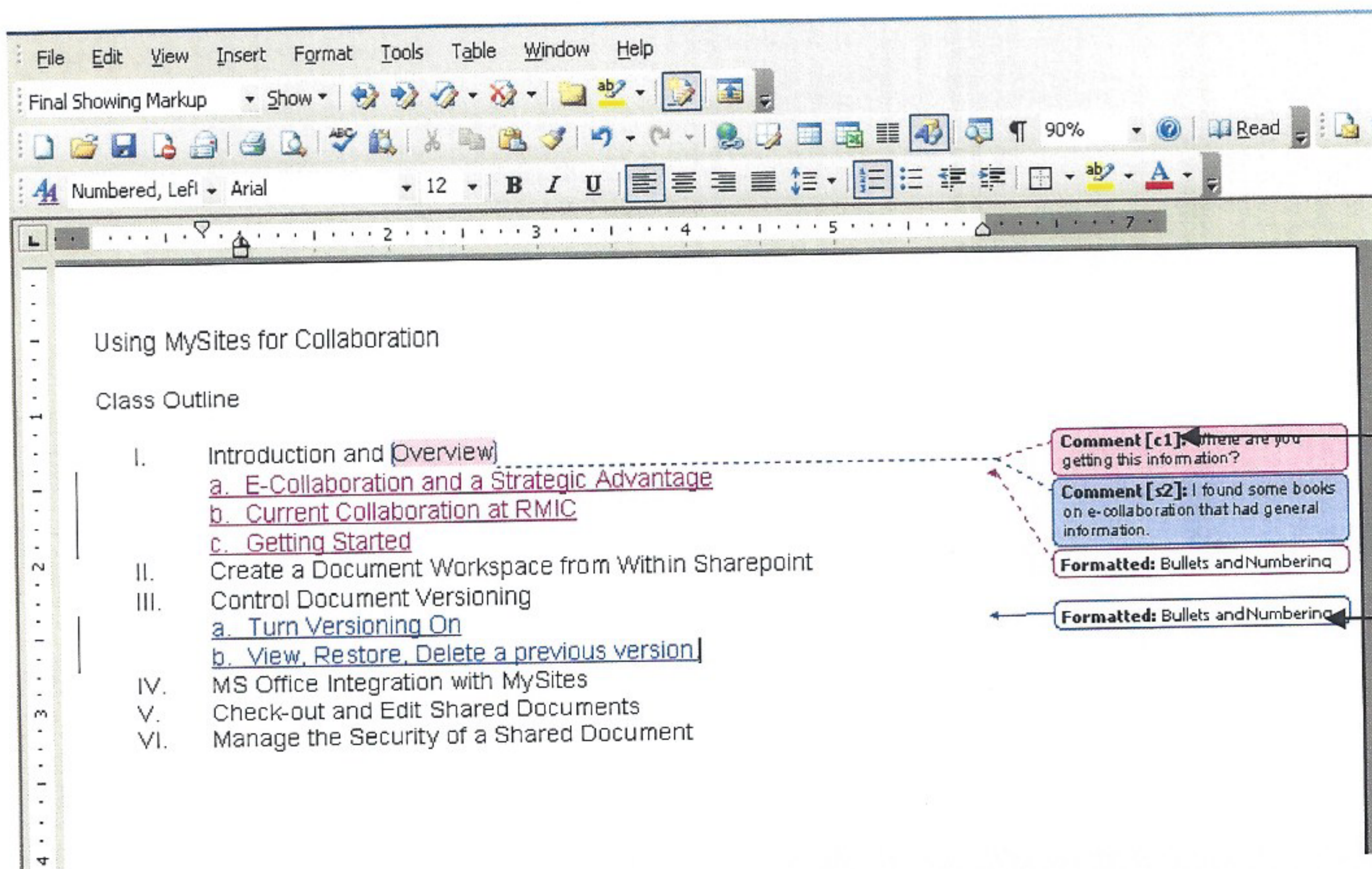
Use the Class Agenda document to demonstrate tracking changes and adding comments.

Note that the class participants may or may not have any prior experience in utilizing the tracking and comment tools within Microsoft Office applications. Therefore move through this section slowly allowing plenty of time for questions.

In addition, you may want to encourage participants to open their exercise document, turn on tracking and follow along as you demonstrate.

When you have multiple individuals virtually collaborating on a document, it is generally a good idea to utilize the reviewing functionalities in MS Office applications.

For example, in **Microsoft Word** you have the ability to track all changes that are made to a document. As each individual makes edits and/or additions, their changes are noted in different colors. As individuals add comments to a document, their comments are noted by their first initial. This allows the owner of a document to easily distinguish between the various contributors.



Each comment is stamped with the contributor's first initial.

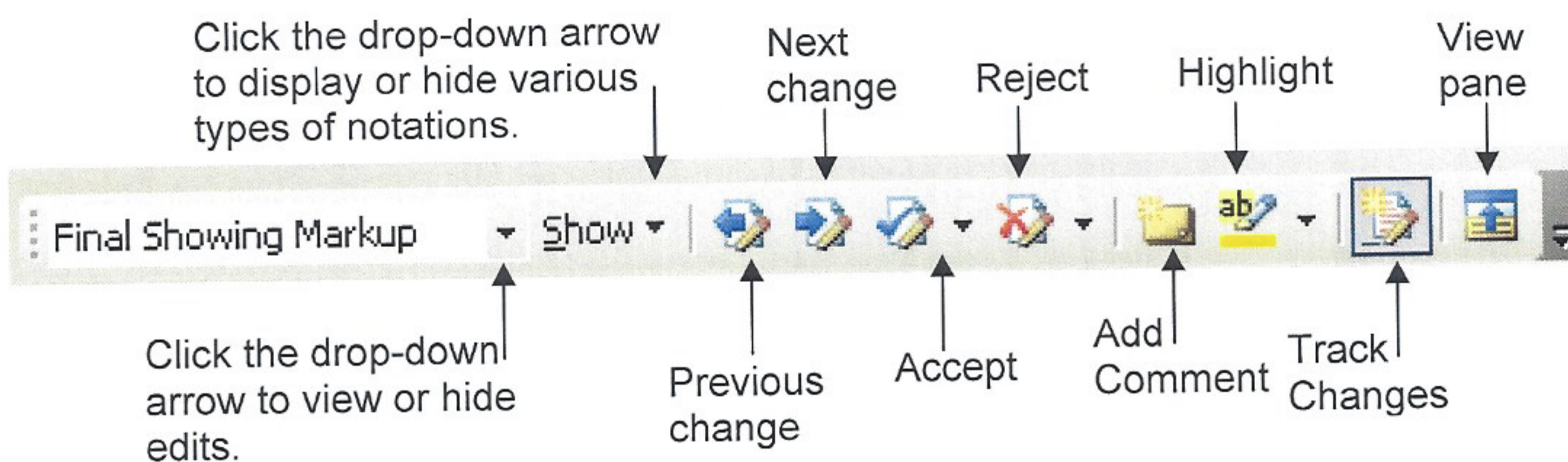
Changes from each contributor display in a different color.

After all of the contributors have added their changes and/or comments, the document owner can determine whether or not to accept each change and/or consider each comment.

Track, Accept, Reject Changes

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When you are collaborating on a document, you should first display the **Reviewing** toolbar.



- To begin tracking the changes to a document, click the **Track Changes** icon. Once the tracking has been turned on, every change to the document will be notated.
- To add a comment, click the place on the document where you want the comment to be inserted then click the Add Comment icon.
- You can use the Markup field to display all changes or choose to view the original or final version of the document.
- Once all of the changes have been completed and comments added. The owner of the document then uses the **Next** and **Previous** icons to navigate through all of the edits. If the owner chooses to accept a change into the document, clicking the Accept icon will remove the markup and incorporate the change into the finished document. Similarly, the Reject icon will delete a change and the markup from the document.

Page 24 – User Guide: Exercises 5.1 – 5.2 will be done together. Allow 7-10 minutes to complete this exercise. These exercises should be completed together as a class with the instructor guiding the participants through the steps both verbally and through demonstration on the PC.

Exercise 5.1

In this exercise you will edit and track changes to your partner's document using the scenario below.

You are still acting in the role of manager. When you open the 2006 Goals document, you click the Tasks icon in the Task Pane and see that you have been assigned a task. You will follow the instructions in the task by adding your thoughts in the appropriate section of the document. You decide to track your changes so your edits will be clearly marked. Once you have added your thoughts to the document, you will mark the task as complete and check the document back into the workspace.

Step-by-Step

1. Verify that your partner's 2006 Goals document is open on your PC in edit mode.
2. Verify that the "**Reviewing**" toolbar is displayed.
3. Click the **Track Changes** icon.
4. Under the header "Strategy for Meeting 2006 Goals", enter in three possible strategies for completing the listed goals.
5. In the **Task Pane**, click the **Tasks** icon.
6. Click the check-box to mark the task complete.
7. Save the document.
8. In the **Task Pane**, click the **Status** icon.
9. Click the **Check-in** link.
10. Close the document.

Exercise 5.2

In this exercise you will view and accept the edits your manager has made to your document using the scenario below.

You are notified that your manager has completed their assigned task. You open the document to view the information. As you review the suggested strategies, you agree with your manager's thoughts and accept all changes into the document.

Step-by-step

1. Navigate to your document workspace.
2. Check out and open your **Firstname 2006 Goals** document.
3. Click the **Accept Changes** icon to accept all of the changes that your partner made to your document.

4. Save and check in the document.

Deleting a Workspace

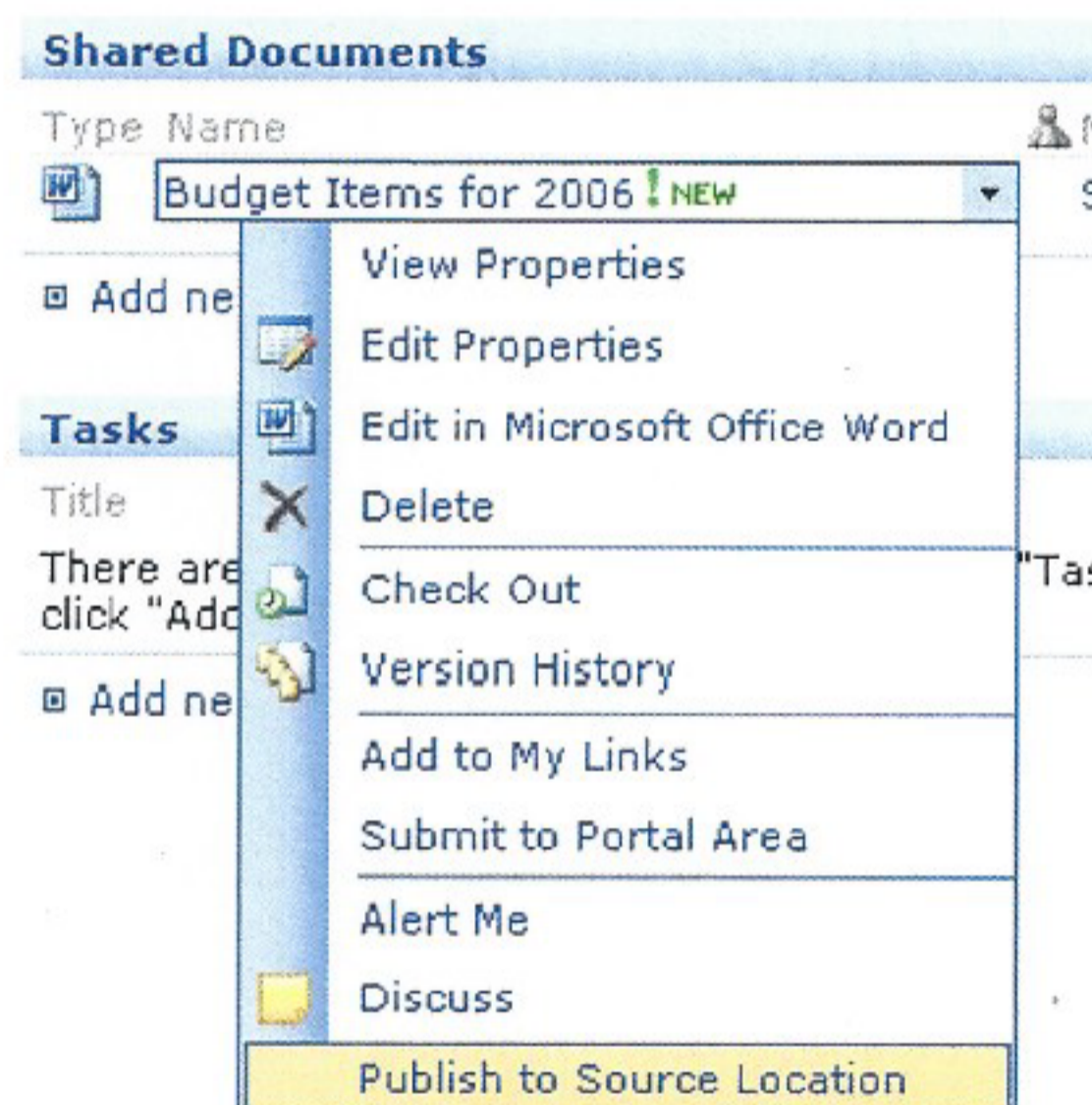
Use the [Class Agenda](#) document to demonstrate.

A Document Workspace is designed to be a temporary space. Once the collaboration is completed, the document should be saved back to the original file and the workspace deleted from your MySite.

Publish Back to Source Location

Before deleting the workspace, you will need to save final version of the document back to the original location. To publish to source location complete the following steps:

1. Click to open the **Shared Document** library.
2. Click the smart tag next to the document.
3. Select "***Publish to source location***".



Deleting a Document Workspace

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Once the document has been saved back to the original location, you will then delete the Document Workspace by completing the following steps:

1. From the Home Page of your MySite, click to open the My Workspace Sites web part.
2. Click the Delete link next to the Document Workspace.

Document Workspaces

 Actuate_QO_Training_Manual	3 months ago	X
 Budget Items for 2006	18 hours ago	X
 Using MySites for Collaboration	2 weeks ago	X

Click the X to delete.

Page 27 – User Guide: Allow 1-2 minutes for this exercise.

Exercise 6.1

In this exercise you will delete the document workspace. It is the end of the year and you no longer have need of this workspace. Delete the Document Workspace from your MySite.

Step-by-step

1. From the Home Page of your MySite click the **My Workspace Sites** web part header to open the web part.
2. Click the **Delete** link next to 2006 Goals.

Class Agenda Documents

Original:

Class Agenda

- I. Introduction and Overview
- II. Creating a Document Workspace
- III. Control Document Versioning
- IV. Sharepoint Integration with MS Office
- V. Reviewing a Document
- VI. Deleting a Workspace

Markup Instructions:

Green type: Instructor – first round

Blue type: co-facilitator second round

Purple type: co-facilitator edits second round

Class Agenda

- I. Introduction and Overview (add comment – should we discuss the benefits?)
 - a. What is Collaboration
 - b. Current Collaboration at RMIC
 - c. Benefits of Virtual Collaboration
 - d. Getting Started
- II. Creating a Document Workspace (add comment – what about as an e-mail attachment?)
 - a. Creating a Workspace within MySite
 - b. Creating a Workspace within an open document
- III. Control Document Versioning
- IV. Sharepoint Integration with MS Office
- V. Reviewing a Document
- VI. Deleting a Workspace