

Better Document Management

Novell Teaming 2: Document Management for the Masses

This article first appeared in the October 2009 issue of *Novell Connection* magazine.

When you first take a look at Novell Teaming, it's likely because you want a better way for your users to collaborate and share information with their peers. As you dig in and start to use it yourself, you'll get even better insight on the value it delivers such as the ability it gives you to generate great ideas; then share, act and preserve them; and then leverage those ideas for other projects. Spanning all three of these value areas, Novell Teaming includes document collaboration/management capabilities that enable users to better manage the lifecycle of the content they create.

Novell Teaming delivers basic document management for the masses that is easy to use, effective and inexpensive.

It should be noted upfront that the document management capabilities in Novell Teaming are not on the grand scale that you would find with a comprehensive and expensive document management platform. Rather, Novell Teaming delivers basic document management for the masses that is easy to use, effective and inexpensive. Perhaps more important is that Novell Teaming enables you to move from the inefficient, error-prone, but often-used e-mail attachment-based document-management scheme to a more efficient and easy-to-use paradigm with version control, access control, histories and powerful workflow capabilities.

> Managing the Document Lifecycle

E-mail was never really designed as a tool for content creation, but we use it that way all the time. You create a

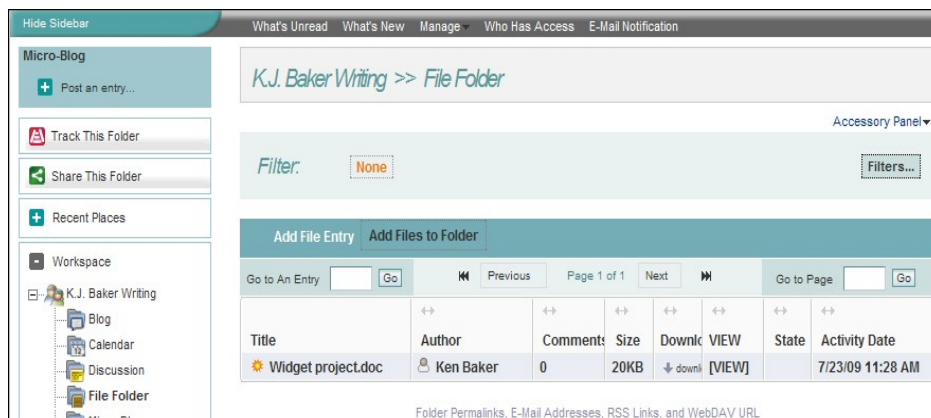
document and e-mail it out to your team members for review. Hours or days later, you receive five or so e-mails back, all with updated versions of your document attached. You then spend hours sorting through and consolidating the edits and comments. When there are conflicts, you have to decide which edits trump other edits, then hope you guessed correctly. If you don't want to do the guesswork, you often must have a conference between team members just to sort out the conflicts. The further you go down the revision path, the more complex the problems become. For instance, you might be on your fifth round of edits when you receive an e-mail attachment full of significant edits, but they're all based on the first version of the document. What do you do then?

Novell Teaming gives you much better control of the document lifecycle by providing a central workspace for document sharing, collaborating, reviewing and revising needs.

Rather than e-mailing your document as an attachment to all your team members for review, you simply post it to a folder in your team workspace.

To post a file to collaborate on, you simply navigate to the folder in the team workspace where you want to store it and click on either *Add File Entry* or *Add Files to Folder*. (See Figure 1.) *Add File to Entry* allows you to browse to the file to be uploaded. *Add Files to Folder* prompts you to drag the desired files from your desktop to the

Figure 1: *Novell Teaming lets you post files to your team workspace for review and collaboration, eliminating the inefficiencies and errors caused by e-mail attachment-based reviews.*



displayed folder icon. (See Figure 2.)

Every time you post or update a file, your team members will be able to automatically see it as a recently added item under the *What's New in Team Folders* section of their personal workspaces. (See Figure 3.) If you want to make sure team members know the file has been posted for review, all it takes is a quick click to send them an e-mail from within the team

workspace or your personal

on the file, including view, edit, export/import, comment,

Figure 2: Posting files to be reviewed is as simple as dragging the desired files from your local desktop to the Novell Teaming Add Files to Folder icon.



modify, reserve/unreserve, copy, move, delete, report and share. (See Figure 4.) The View window also shows you who posted the file and when, as well as who most recently modified the file and when that modification was made.

Click on the View option beside the filename to display an HTML-formatted version of the file in a new browser window. If you click Edit, Novell Teaming locks the file and allows you to edit it from within Novell Teaming. While it's

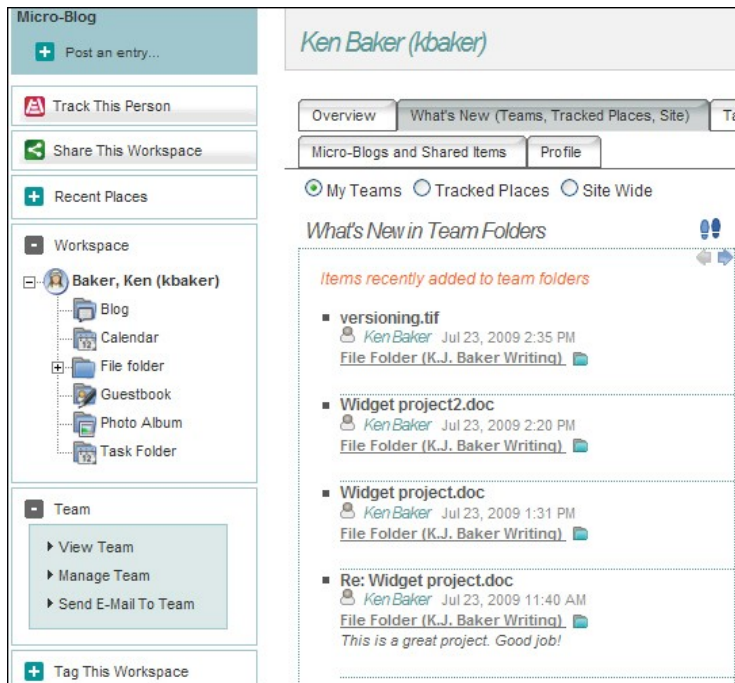
workspace. Also, team members who have subscribed to that folder or file entry will automatically be notified when any activity, such as new postings, updates or comments, takes place.

When team members visit the team workspace and click on the posted document, Novell Teaming displays a View window that provides a number of options for acting

locked in this edit mode, no other team members can modify the file, helping you to ensure version consistency.

If you want to work on the file offline, click the Reserve option from the View window navigation bar and then download the file to your local machine for editing. The Reserve option is essentially a document "check-out" capability that locks the file so only you can modify, move,

Figure 3: Every time a file is posted or updated in Novell Teaming, team members will be able to automatically see it as a recently added item under their What's New in Team Folders section of their personal workspaces.



copy or delete the file. (See Figure 5.) When you're ready to check the file back in and unlock it to allow others to work on it, simply upload the new version and click Unreserve.

The View window also provides a listing of all the previous versions of the file, including who modified them and when. (See Figure 6.) You can view any of the previous versions by simply clicking on one of them. One of the feature improvements in Novell Teaming 2 is that the Previous Versions default list only shows information for the last three file versions, instead of the complete list, which can get quite lengthy. Novell Teaming 2 does, however, give you the option to see the entire list if you prefer.

Novell Teaming makes it easy to comment on a document so others can quickly see the comment without having to search for it embedded deep within the document. Posted comments display on the View window and show the comment contents, who posted it and when. Of course, you can still use comment capabilities inherent to the file's native application, but the Novell Teaming comment feature gives you a more visible option that can

The custom forms and workflow capabilities in Novell Teaming also give you the ability to add formal structure and automated processes to the management of your documents.

Figure 4: *Novell Teaming provides a number of options for acting on a file, including viewing, editing, exporting/importing, commenting, modifying, reserving/unreserving, copying, moving, deleting, reporting and sharing.*



These workflow capabilities also enable you to go beyond just managing content contained in files that you upload or import; they also give you a means to manage content posted in wikis, discussion forums or landing pages as well.

For example, you might have a landing page where you publish internal articles each month on workplace safety or improving customer relationships. Custom forms and workflows could be created to handle the process from initial article submission by the author to reviews for

language and technical accuracy. The documents could move from various staging folders as different versions are accepted or rejected until it is approved for publication and automatically transitioned onto the landing page. (See Figure 7.) In fact, the Novell Teaming Library contains an article review workflow template that you can download and customize to fit your organization's needs.

(Visit novell.com/communities/cool-solutions/teaminglibrary.)

Managing all the content users and teams generate in support of your organization's success is no small task. By leveraging the embedded workflow capabilities in

be used to provide general comments on the entire document collaboration or review process.

Since Novell Teaming indexes all stored documents in a single, easy-to-use index, you don't have to waste time hunting for files if you can't remember the workspace or folder where they are. A quick search can give you the location link, as well as links to relevant wiki pages and discussion forums, if desired. Additionally, regardless of how you use Novell Teaming to manage your document lifecycles, its built-in access controls enable you to restrict access to those documents. Access can be granted to specific teams or specific users, or can be based on inherited rights.

> Get in the Flow

The custom forms and workflow capabilities in Novell Teaming also give you the ability to add formal structure and automated processes to the management of your documents. A simple example is using a workflow to force a review of certain documents every few months by particular team members. A more elaborate example would involve having a workflow automatically govern the whole process of checking in file updates, notifying team members to review the files, warn team members when final updates are due, move documents through different staging folders as the review cycle progresses and more.

Figure 5: *You can check-out a file to work on it offline by using the Reserve option, which locks the file until you unreserve it.*



Figure 6: *Novell Teaming tracks the history of previous versions of documents in your team folders.*

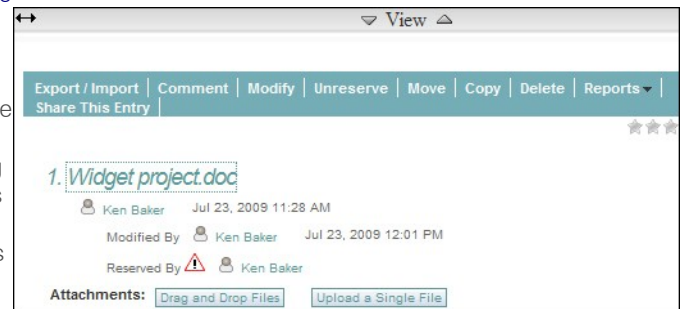
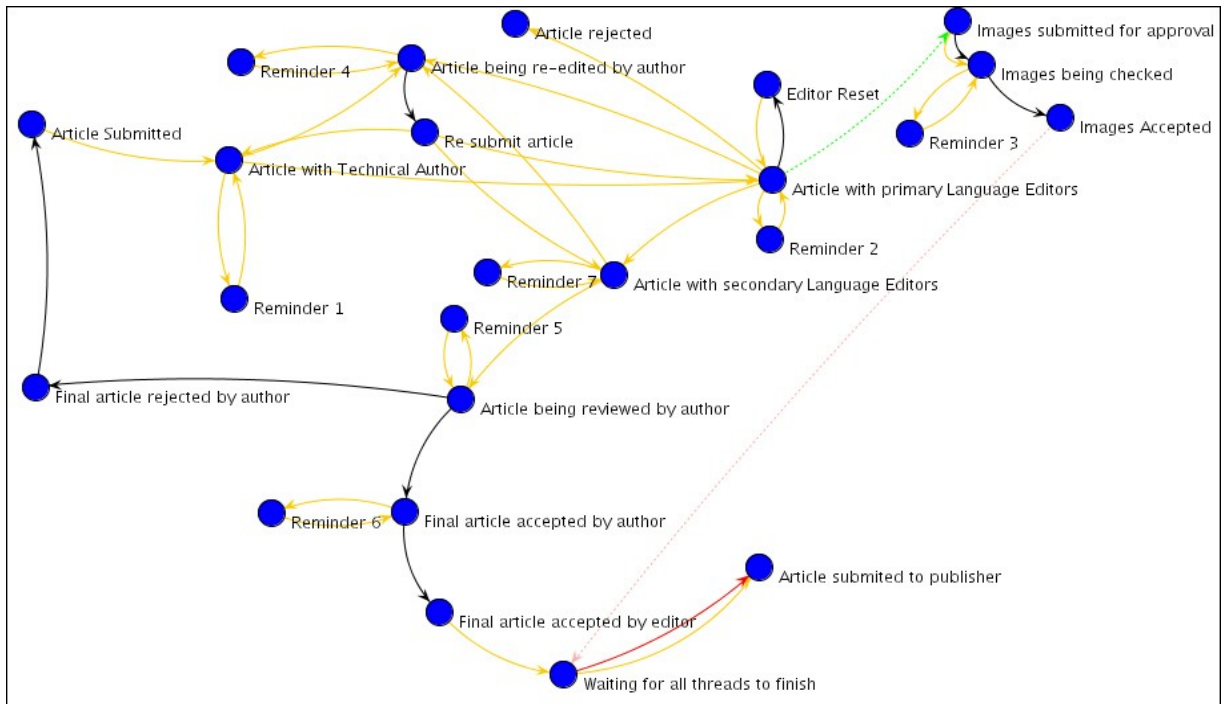


Figure 7: By leveraging the embedded workflow capabilities in Novell Teaming, users can easily create business processes to transition documents and content throughout the entire organization.



Novell Teaming, your users can take on much of the responsibility themselves—easily creating business processes to transition documents and content throughout the entire organization. It even gives every user the power to document their work and processes to make the whole organization more efficient and productive.

It's understood that full-featured document management is out of reach for most users and

businesses due to its expense and complexity. However, the basic, yet powerful capabilities in Novell Teaming deliver many of the essential document sharing, tracking, versioning and process controls that most organizations need. Even though you might not initially leverage Novell Teaming for document management, that functionality can easily become an integral and highly customizable part of your core collaboration platform at no additional cost—and that's always a welcome benefit. **N**