

Document Management and Publishing Solution Setup

Design Planning

It is recommended that this solution be implemented as a multi-site solution. The first site is the working site provided as the site template. The second site is another SharePoint site on your intranet where you place the Published Documents library. However, if you choose, you can keep the solution in a single site, and the Published Documents library can co-exist in the primary document management site (this is how the solution's site template is packaged).

This solution is a workplace accessory that can be added to many other solutions or sites. Any subject area in your organization that has a need to publish documents can have one or many CorasWorks Document Management and Publishing solutions added to provide a process for working on documents before pushing them to a document library containing finished documents. This includes document libraries you already have set up that have become difficult to manage or have a need to be more secure. To publish to an existing library, simply point the "Publish (security required)" action to that existing library when you get to the setup step for that action below.

Setup

A basic knowledge of how to administer SharePoint and how to set up CorasWorks web parts will be helpful in making the changes specified below. If more instruction is needed, refer to the CorasWorks Capabilities Guide.

Task	Directions
Create Working Site	Create the site from the CorasWSC.DocMgmtandPublishing.v8.0.1 template. This site will be the site where collaboration on documents occurs and version history is kept. Give it an appropriate name for your work. For the remainder of this document, it will be referred to as the Working Site.
Create Published Site and Library	<p><i>Skip this step if you intend to use the Published library stored in the site.</i></p> <p>Create a Published library. If necessary, first create the site that you want to contain the published documents. Steps to create the Published Library:</p> <ul style="list-style-type: none">• Go to the Published document library in the newly created working site• Click Modify settings and columns• Click Save document library as template. Suggested template name: "CW Published Documents".• If the Published library will be in a site in a separate site collection:<ul style="list-style-type: none">• Go to the list template gallery and click the template created above. Save the file to your computer.• Go to the site where you wish to publish documents and go to that site's list template gallery.• Upload the list template file.• Go to the Create page in the site for published documents• Select the list template you just created for the new list.

Task	Directions
Set up the Doc Mgmt Directory list	<p>In the Working Site, open this list. It contains two entries, one for the Working site and one for the Published site. For each entry, change the Title field to the name of the site, and paste the appropriate URL into the Site URL column. See the Doc Mgmt Directory List section below for a detailed explanation of how this is used.</p>
Set Active Display web parts to display data from the Published Library	<p>Publish tab: Published Documents web part Follow these steps to point the web part to display information from the Published library:</p> <ul style="list-style-type: none"> • On the web part menu, select Actions Show Admin. • On the Sites & Lists tab, make sure Based on Directory List is selected. • Enter the current site's URL as the Directory List URL and click the Refresh link. • For the Directory List Name, select Doc Mgmt Directory. • For the Directory List View, select Published. • Click OK. <p>Published Documents view page: Published Documents web part Follow the steps above.</p> <p>Published and Working Comparison view page: Published and Working Documents Together web part Follow the steps above except for the Directory List View, select All Items.</p>
Configure the Publish (security required) Action	<p>Go to the Actions Wizard page under the Tech Admin tab.</p> <ul style="list-style-type: none"> • Edit the Publish (security required) action., • Under Destination List, specify the site URL and the list name containing your published documents. • For the Destination list only, select the Use List Specified Above option.

Task	Directions
Configure Chained actions	<p>Go to the Actions Wizard page under the Tech Admin tab. If using Central Configuration:</p> <ul style="list-style-type: none"> • Click Maintain Global Links • Add a Global Link with the name [DocMgmtPub]. For the URL, use the URL of the current site. • Click Submit. <p>If NOT using Central Configuration:</p> <ul style="list-style-type: none"> • Edit the action named Publish. In the configure action definition section, set Action 1 to Set Status to published and set published date. Set Action 2 to Publish (security required). • Edit the action named Mark as Review Complete and Notify Publisher. In the configure action definition section, set Action 1 to Set status to Review Complete. Set Action 2 to Email publisher to publish. • Edit the action named Mark as Awaiting Review and notify reviewer. In the configure action definition section, set Action 1 to Set status to Awaiting Review. Set Action 2 to Email document link.
Specify the publisher's email address	<p>Open the Documents library.</p> <p>Click Modify Settings and Columns, and change the Publisher Email choice to the email address of the Publisher for your organization. Make sure the default value is filled in with the same email address.</p>
Set up Document Category values	<p>Still in the settings for the Documents library, edit the Document Category column to contain the appropriate values. You may want to start with only one value of "Not Applicable" and add more categories only if needed.</p>

Security Setup

Task	Directions
Working Site Groups	<p>Set the permissions on the Working site as follows:</p> <ul style="list-style-type: none">• Contributor: Only those who need access to edit or view draft documents. Those who will be reviewing documents and the Publisher will need Contributor access.• Reader: Remove everyone from the Reader group. Make sure the site does not allow anonymous access or “all authenticated users.”• Administrator: Assign at least two people, one to be the primary administrator and one as a backup. These people will maintain site permissions and have access to make any other changes to the site.
Working Site Instructions	<p>On the Document Management and Publishing site, you may choose to change the security for the Instructions list so that only the Administrator can update instruction text. This will prevent others from accidentally making changes.</p>
Published Site or Library	<p>Set the permissions for the Published site (or just the Published library if the library is in the same site) as follows:</p> <ul style="list-style-type: none">• Contributor (or View, insert, edit, delete items): The people you want to designate as the Publisher. Assign at least two people so that there is a backup available.• Reader (or View items): Everyone who should be able to see finished documents. You can use anonymous access or all authenticated users.• Administrator: Usually the same administrators assigned for the Working site or a person in charge of publishing.
Admin Navigation List	<p>Change the permissions on the Admin Navigation list as follows:</p> <ul style="list-style-type: none">• Remove all existing groups or users• If needed, add anyone who is not a Site Administrator, but should see the Tech Admin pages named in the Admin Navigation list.

Print Action and the CorasWorks Client

If your organization does not use the CorasWorks Client on the desktop, then the Print Document action will not work. You will want to do two things:

- Remove the web part on the main page that shows the Client Refresh button.
- Remove the Print Action from Active Display web parts that use it. (From the Web Part Menu, select Actions | Show Admin, then select the Actions tab.)

The Doc Mgmt Directory List

The Active Display Sites & Lists option to get values from a “directory list” is preferred for two reasons:

- It makes it so that the URL for the published site only needs to be entered in one place (in the Directory list) and it applies for all three web parts in which this setting is used.
- If the location of the Published directory changes, you only need to change the URL in the Directory List, and all the web parts based on it will still work. This can be useful in getting started, because you may publish documents to a temporary location and change it later as you refine your use of this solution.

Additional Implementation Options

You could add additional document libraries to the Working site to separate and organize your working documents and restrict permissions to different people for the different libraries. The CorasWorks roll-up displays and Active Displays throughout the site will automatically pick up documents from any additional libraries, as long as they are created based on a template of the original Documents library. Be sure to set up the Publisher email for each library.

Technical Reminders

Assumption: Your organization has imported user names and email addresses to the SharePoint user information. If not, the Reviewer fields should be deleted and recreated as “choice” with the ability to add your own items not in the list, and the site admin must manually type in email addresses to the choice list.

Notify your search administrator of the URL of the published library and request that it be included in your company’s intranet search, if appropriate.