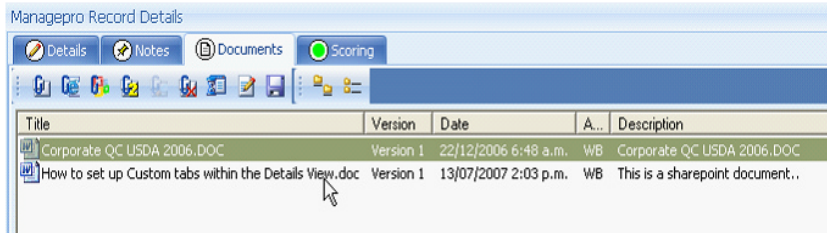


Sharepoint, Overview and Configuration

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If a user has a Microsoft SharePoint server installed and available, ManagePro offers the ability to browse the SharePoint server and attach documents from the SharePoint server to ManagePro records as part of ManagePro's document management system.

Note that in the attached document display, the Description field automatically identifies a document attached from a SharePoint location.



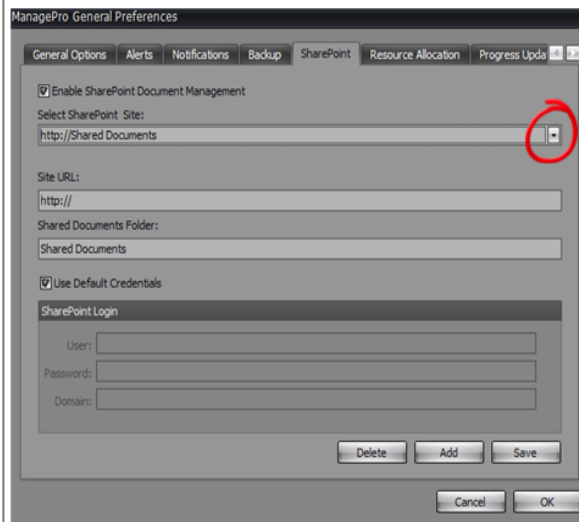
ManagePro Record Details

Details Notes Documents Scoring

Title	Version	Date	A...	Description
Corporate QC USDA 2006.DOC	Version 1	22/12/2006 6:48 a.m.	WB	Corporate QC USDA 2006.DOC
How to set up Custom tabs within the Details View.doc	Version 1	13/07/2007 2:03 p.m.	WB	This is a sharepoint document..

Version 9.0 extends Sharepoint capability in two ways:


1. To support multi-level document repositories, the shared document folder can be appended to the URL in the dropdown control.
2. To enable access to multiple Sharepoint sites. Previous versions only supported one site. Sharepoint locations are defined in the General Preferences/Sharepoint option and are available as a drop down list when attaching documents using the Sharepoint Link within the Document Management tab



ManagePro General Preferences

General Options Alerts Notifications Backup SharePoint Resource Allocation Progress Update

Enable SharePoint Document Management

Select SharePoint Site: 

Site URL:

Shared Documents Folder:

Use Default Credentials

SharePoint Login

User:

Password:

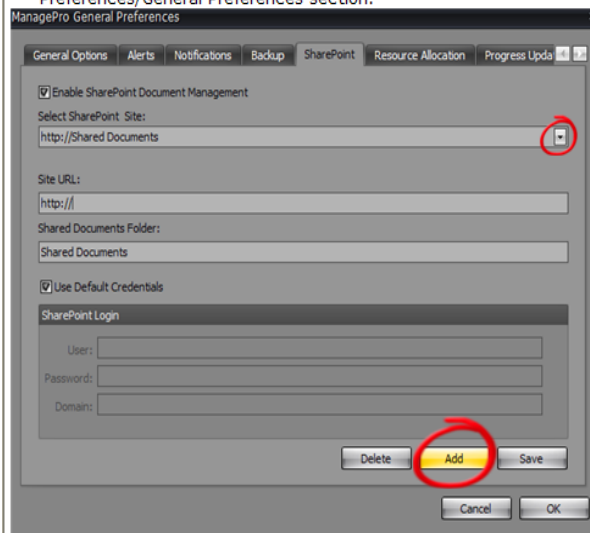
Domain:

Delete Add Save

Cancel OK

Here's a brief description of how to configure and use this functionality.


1. First notify ManagePro that a SharePoint server exists (check the enable box) and complete the configuration fields found in ManagePro Preferences/General Preferences section.



ManagePro General Preferences

General Options Alerts Notifications Backup SharePoint Resource Allocation Progress Update

Enable SharePoint Document Management

Select SharePoint Site: 

Site URL:

Shared Documents Folder:

Use Default Credentials

SharePoint Login

User:

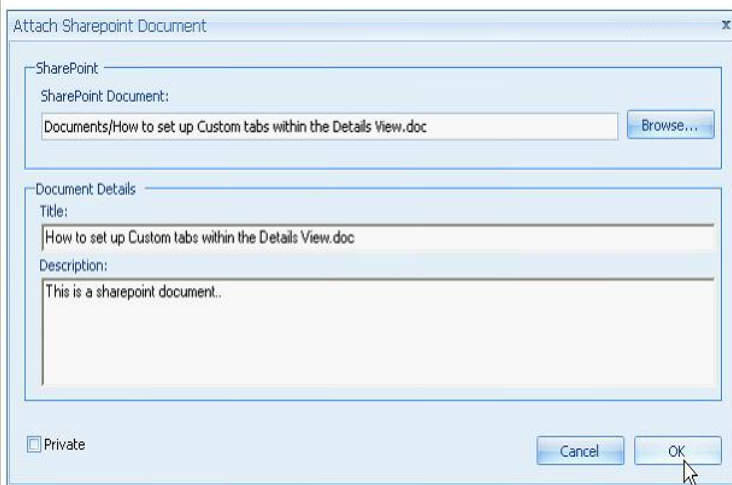
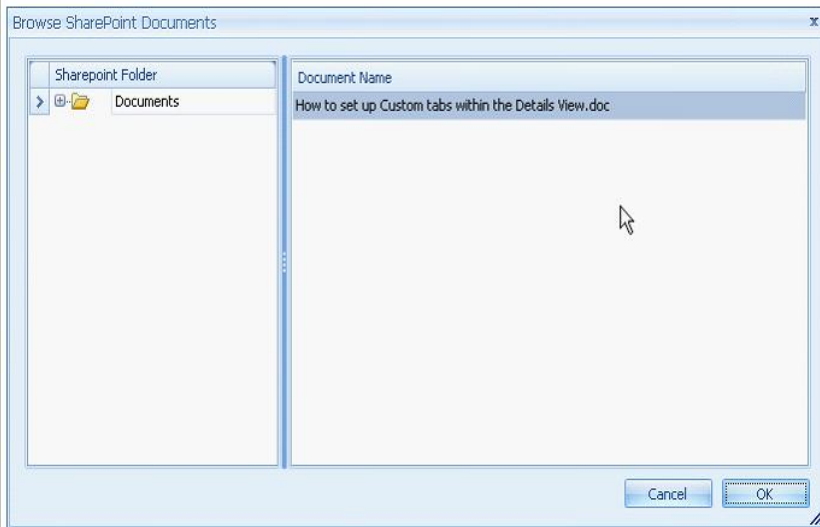
Password:

Domain:

Delete **Add** Save

Cancel OK

2. Once that is completed, attaching documents is simply a matter of browsing to the SharePoint server when in the document attachment window. In this example the user has browsed to a SharePoint folder of Documents and identified a document to be attached with the title of "How to set up Custom ...".



3. Note that SharePoint documents are available in a read-only format within ManagePro. If you wish to edit them, you must first check them out from SharePoint and then save your changes back to a new version in SharePoint.

