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Knowledge Sharing Through MS SharePoint

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Abstract

Microsoft SharePoint is being used in Government, private, public and association offices throughout the United States. SharePoint was created to increase accountability for projects within a team environment. How could SharePoint help increase accountability in information management? This article will review SharePoint's positive and negative characteristics in the hopes of helping information professionals understand what SharePoint really is in the information world and how it can be applied to libraries and other information management organizations.

Author keywords: SharePoint; Information Professionals; Usage

Problem

Microsoft SharePoint allows information professionals in an organization to easily create and manage their own Web 2.0 environment. SharePoint is not a specific product but several aspects of Web 2.0 solutions.¹ Two versions you may encounter in the office: Windows SharePoint Services (WSS) 3.0, which is the basic compilation of applications, and Microsoft Office SharePoint Server (MOSS) 2007, which contains special features to add on to your SharePoint. How could SharePoint help increase accountability in information management?

SharePoint helps you to manage the prime real estate on your organization's server or organization's hosted space. Look at SharePoint as a home improver and your organization's server as a house. SharePoint could help you organize the storage space so that you could collect corporate knowledge and manage your library collection. Out of the box SharePoint will help you format your server into various modules or rooms. These rooms would be recognizable Web 2.0 tools, such as, Blogs, Wikis, Document Libraries, and Discussion Boards. SharePoint would also provide you with amenities for your house, for example, Announcements, RSS feeds, E-Alerts and Web Parts (similar to widgets or gadgets).

Review of the Literature

SharePoint houses a database (SQL Server 2005 Express) to help it remember how you want everything to function and store any documents from your library collection.² SharePoint was originally created back in 1997 as four platforms: web content management; collaboration; document management; nuggets that display information from different content sources. Through MOSS or WSS, Microsoft has tried to harness what we know of social media sites and mixed it together with our document management practices.³ In the beginning, SharePoint was an IT only application but now it requires input from two groups: the installers and the users. They have to work together to figure out what they want their SharePoint site (portal) to do for their organization. I mentioned organization because SharePoint is an enterprise management platform meant to be used by the whole organization. The departments of the organization would gain access to whatever the whole organization agreed on for the functions of SharePoint. For example, Town State University was already using WSS.⁴

The Albert S. Cook Library's Reference Department at Towson University wanted an inexpensive non-programming solution to help them manage their reference department policies, procedures and statistics. Towson University had already implemented MS SharePoint MOSS on the University's servers and provided user



training,⁵ but the department was interested in the management of its Reference Desk. This would include the online reference transaction collector, announcements, issue tracking, and the latest changes to a Reference Manual Wiki. Librarians used the following SharePoint components to accomplish this: Document Library; Wiki Page Library; Announcements; discussion board; Links; Calendar; Issue Tracking; Survey; Web Pages; RSS Feeds; Site Aggregator or Page Viewer Web part (Displays Reference Tracker built in MS Access).⁶

Information and Library Services' Document Management Team at University of Maryland University College has "three remote circulation pick-up and return locations" located in the same state but training was not steady. The Document Management Team (Access Services - Circulation and Interlibrary Loan) figured out how to provide steady training and updated documentation for the "remote circulation points". The objective was to bring their department's knowledge together in one place (p.136). They used the following components for their SharePoint solution: wiki; document library; e-alerts; document version history; calendar; links; announcements; page view web part (Twitter's OCLC "tweets").⁷

Mitre's Information Service department created "nine cluster groups" to cover the subject interests of the organization. Each cluster had a "lead" in charge of planning meetings, setting agendas and ensuring "cross-cluster communications" would occur. A "subject matter expert" was placed in each "cluster group" dependent on the subject of the cluster group's subject area. They wanted support for managing information collections and a method to communicate up to date information about their projects. The SharePoint components used were wikis and RSS news alerts.⁸

Lister Hill Library of the Health Sciences used University of Alabama – Birmingham's deployment of the SharePoint 2007 platform. The website/portal management capabilities of the platform replaced Microsoft Outlook folders and shared network drives. The library staff implemented permissions, content tagging, search feature (for whole site, sub-site, list, or library),

content types, and user automatically generated "My Site".⁹

Ennis and Tims suggested that a library could use SharePoint as a data collection tool with the data saved in a database on the server. The SharePoint platform was used to create request forms to request educational sessions. Reports could be viewed through an Excel spreadsheet. Another form type was created for reference librarians to enter transcript from chat sessions on other data. The data was captured in Excel and Access to create real-time reports and charts.¹⁰ Documents could also be linked to the captured data for a knowledgebase used by the reference librarians.

A SharePoint platform was also used to manage files associated with a budget subsidy project in a portal site using a connection between Excel and Access to show billing information by month, status, and pricing and user information in real time.¹¹ In order for SharePoint to work, everyone involved needed to be on the same page. There had to be a plan of action or SharePoint governance plan that would define what type of system was needed before the system could be designed and implemented. The ultimate outcome was for a plan that allowed a step by step method to reach small goals. In the end, a complete system would be created through the increments of time.

Through SharePoint, co-workers would be able to capture and share ideas, information, communication, and documents and facilitate internal participation in surveys, discussions, and shared documents "24x7".¹² Electronic documents could be checked in, checked out. You could also activate document version control so that staff who would be using specific documents would know how current they were. Staff can easily create workspaces for meeting discussions, surveys, documents, task lists, issues, contacts, announcements, Web links, and calendars and other collaboration needs that increase their productivity in a central location.

What usually makes this platform fail in organizations is the lack of proper skill sets to identify your organization's needs. It is best to map the needs to the SharePoint features in order to understand what you really want SharePoint to do

for your organization (http://innovative-e.com/artifacts/assessment/IEC_Org_SP_Feature_Mapping_Assessment.xls).

Application of MS SharePoint

As the former Library Director “of the Association of Governing Boards of Universities and Colleges' Zwingle Library and Resource Center”, I had to manage a collection that harnessed not only printed information but tacit knowledge that would “guide trustees and regents; campus, public college, and university foundation CEOs; board professional staff members; and senior-level administrators” in their positions at their institutions.¹³ By working with Program Directors and the CEO to capture tacit knowledge, using SharePoint on a sandboxed hosted server gave the organization the following abilities:

1. To capture the “who”, “what”, “where”, “why”, and “how” of each of their projects;
2. To correlate projects with electronic documents in the SharePoint knowledge base;
3. To track who has checked out which electronic documents for which project;
4. To allow members and staff to submit electronic documents in their possession for possible inclusion into the SharePoint knowledgebase.

The library collection of the Zwingle Library and Resource Center covered the subject area of higher education governance systems. The tacit knowledge was to fill in the gaps of the printed material in the collection. This information would be the “know-how” or experience that the members would have on areas not covered by the books. It would be issues that occurred as they performed their duties in their jobs – skills that could not be taught through the written word but through experience alone.

Through a sandboxed knowledgebase template site housed on a hosted SharePoint platform, members and staff could route tacit knowledge – “experiences and rules of thumb that are not ordinarily written down before, during, and after projects” – through SharePoint for review by

the program directors and the CEO.¹⁴ After the program directors and the CEO have selected the tacit knowledge to be contained in the SharePoint knowledgebase, it is sent for official acquisition to the Library Director (see Figure 1):

- Collaborate with each Program Director
1. Develop the information in the collection into updatable artifacts
 2. More efficient with defined workflows
 3. Have direct access to the most current version of a document
 4. Have access to people’s reflections on past and current projects in wikis and blogs.

System Requirements

The basic features of SharePoint can be found in WSS 3.0 (Windows Shared Services). It is a built-in component of Windows Server 2003 (<http://sharepoint.microsoft.com/product/related-technologies/Pages/windows-sharepoint-services.aspx>). “WSS ... is the core ‘engine’ of SharePoint. Without WSS there is no SharePoint MOSS ... provides extended capabilities to WSS...”¹⁵ If these “extended capabilities” are not added to your SharePoint, SharePoint will still work. It is licensed via the CAL/Server model

(<http://www.microsoft.com/windowsserver2008/en/us/licensing.aspx>). SharePoint is compatible with MS Office 2003 or later and other Microsoft products. It comes with the Microsoft SQL Server 2000 Desktop Engine (MSDE) as a default database with around 4 Gigabytes of storage space (<http://social.technet.microsoft.com/Forums/en-US/sharepointgeneral/thread/9dfa09f4-9b55-44fa-9213-1437a24d1a50>). Migration of your data could be to a full version of SQL Server 2000 (<http://office.microsoft.com/en-us/sharepointportaladmin/HA100241281033.aspx>).



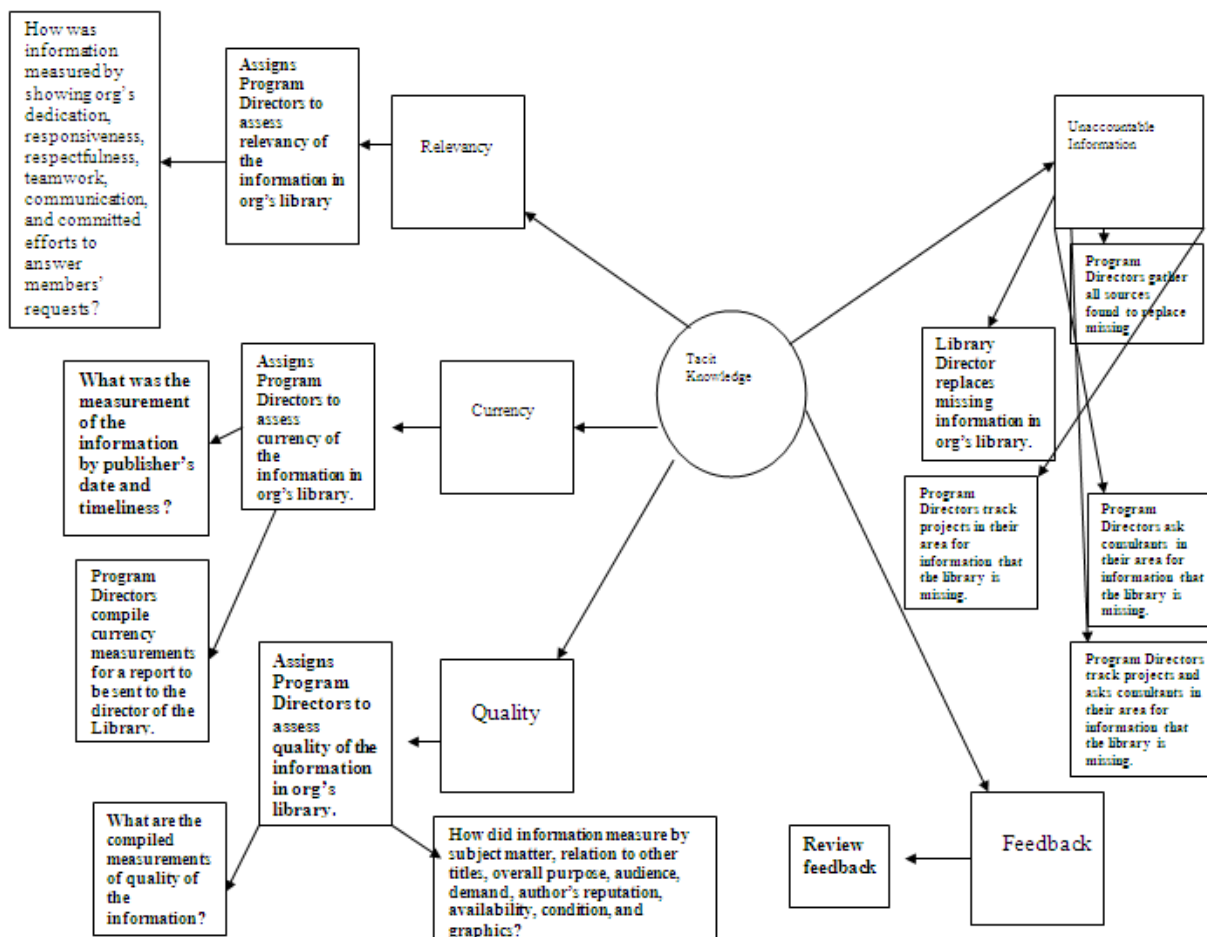


Figure 1. Capturing tacit knowledge from Program Directors of a non-profit organization.

The hardware/software installation and configuration should be conducted by your IT department (<http://technet.microsoft.com/en-us/library/cc288751.aspx>). It is very complex and will require your IT department to plan the backbone of your SharePoint site through a specified Microsoft document and worksheets (<http://technet.microsoft.com/en-us/library/cc288426.aspx>). Once SharePoint is configured on your server, creating the front-end of SharePoint website would be moderately easy to do (<http://vimeo.com/5775678>).

The MS SharePoint Collaborative Community

The IT department's job is to configure the backend of SharePoint for your organization's server. Your job will be to configure the front-end of your SharePoint site. Since SharePoint is an enterprise platform, all staff need to be a part of helping IT understand what they want to implement the front-end side of SharePoint

(<http://innovative-e.com/artifacts/assessment/SharePoint%20Empowerment.pdf>). If IT can understand how each user will use the system, then the back-end would be configured correctly to function with the front-end.

It is with this collaborative approach that works out great for cataloging purposes. For example, if you had an educational governance collection, the Cataloging Department could create two content types called Board Minutes and Board Bylaws.¹⁶ When catalogers go to the Document Center template (<http://office.microsoft.com/en-us/sharepointserver/HA102413991033.aspx>) to create or upload a document, each of these content types would appear as an option in the document library.¹⁷ All board minutes and board bylaws could share a common format but the content types would each specify its own custom columns, so that, for example, all board

minutes that would contain metadata about certain board bylaws would have the noted relationship. The content types would contain its own workflow, so that the catalogers could be confident that every board bylaw would follow the same feedback and approval processes. Since board bylaw's specifications would be contained in a different content type, those documents would follow different processes and have columns

(<http://www.endusersharepoint.com/2007/10/29/tips-and-tricks-use-a-lookup-table-instead-of-a-choice-dropdown-list/>) that require different metadata. The metadata would be searchable

(<http://vspug.com/fortheuser/2007/11/01/the-importance-of-metadata/>). To filter search results in the document library, click the Filter button in the toolbar

(<http://blogs.officezealot.com/reinhart/archive/2005/04/13/4533.aspx>). You could copy and paste the link of the results webpage to whoever you want within your organization. This would help you to avoid using the "folder" feature of SharePoint.

The folder feature seems to be the most confusing of all of the features in SharePoint. With the "folder" feature, you can create electronic folders like you could have on your organization's server in a Microsoft environment, such as XP operating system or in your MS Outlook. The problem is that folders can take a life of their own and different people place documents in folders that make sense to them and not to others.¹⁸ Your organization's server becomes filled with "folder clutter". The only way to eliminate

this problem is to look at the contents of each folder.¹⁹ The search feature works better with the metadata in the documents from the content typing process.

Out of the box SharePoint also comes with meeting workspaces that can serve as the repository for related artifacts.²⁰ Not only would the relevant information be stored in a single location, it could be limited to the key individuals involved in the meeting.²¹ SharePoint can e-mail the link to that document to those key individuals.

Decision makers have to be involved with strategically prioritizing business needs that can be addressed by SharePoint. The library is the heart of the organization and a key component in strategic planning. It is the only place where information can be found:

1. To make strategic decisions
2. To find updated information on related subjects of organization
3. To contribute internal information to the library to share with the other staff
4. To bring the business processes of the organization together with the collection information in a meaningful relationship – content and lived experience
5. To retrieve and use information to make money for the organization.

The figure below shows percentages that are examples from a study on how information was used within information centers and special collections but it could also apply to how staff would use the information if it were used in SharePoint.²²

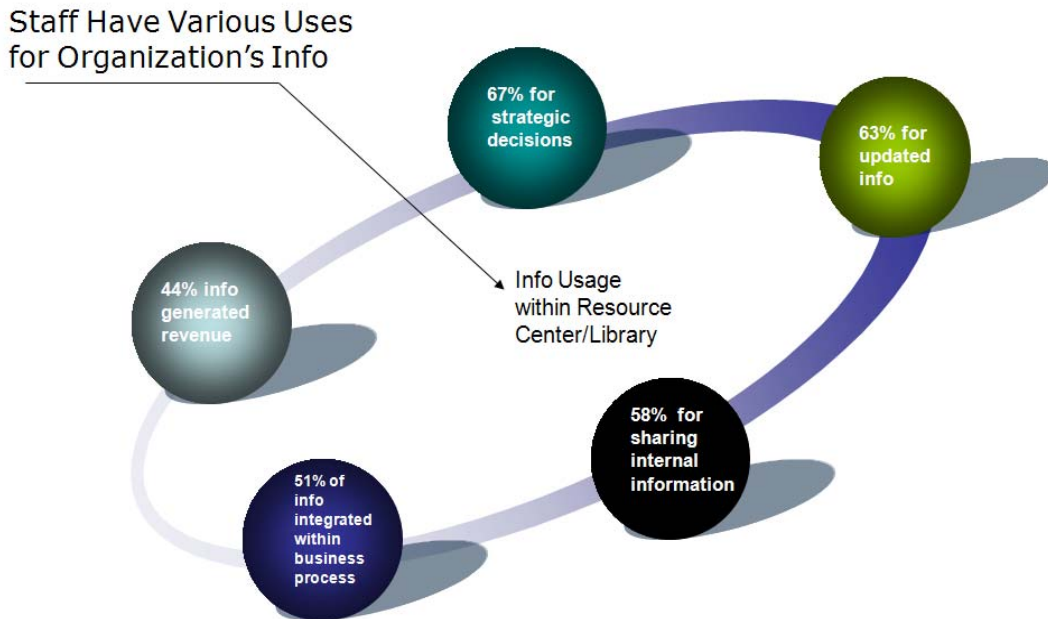


Figure 2. Percentages of information usage from within information centers and special collections.

Conclusion: Could MS SharePoint Work for Your Library?

The SharePoint platform could work in your library if your organization grants you the proper permissions and site space from within their SharePoint solution. I used a hosted sandboxed environment to avoid conflicts with the IT department's already defined tasks for the organization. It allowed the library collection flexibility to develop through SharePoint's knowledgebase site template. It also allowed the collection to be updated faster than waiting for printed material. You may not have this ability in your organization.

In order to see if SharePoint would work for you, do the following:

1. Establish the functionality of your organization's SharePoint platform. Is it being used or is it taking up space on your organization's server? Sometimes it is purchased because it is the latest technology but is quickly forgotten because of other duties that staff may have.
2. Establish who is the "point of contact" for your department with your organization's IT department. If you had this role, you

- would be able to talk directly with IT to find out what the organization's vision is for this platform to function for your organization. This role will also come in handy when you need something adjusted on your department's SharePoint site.
3. Find out who bought and decided on the purchase of SharePoint for the organization. It is best to get the "vision" of your organization from the person who decided on getting it for the organization.
4. Search for a SharePoint governance plan for your organization. This plan would have been created by a committee of designated staff to define rules and regulations for the usage of the SharePoint platform from within their organization.
5. If you cannot find the "point of contact" for your department or the reason why the SharePoint platform was purchased and installed for your organization, you may not adequately be able to use SharePoint for any defined uses that your department wants it to do.
6. Reverse Engineer the SharePoint platform and design a SharePoint governance plan for your organization. This would require you to also become the "point of contact"

for your department or the mediator between the organization and the IT department.

Using MS SharePoint is all about organization and bringing your fellow employees together as a team.

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