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What librarians should know about SharePoint

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Microsoft has been adding 20,000 SharePoint users per day, every day for the last five years. That's 7.3 million new SharePoint users every year. If your organization hasn't been hit by the SharePoint tsunami, chances are it soon will be. What will that mean for corporate librarians?

Here are 10 things librarians need to know to help their organizations increase the return on their SharePoint investment.

1. *SharePoint is a development platform, not an application.* Don't expect SharePoint to offer the specialized functions available in your Integrated Library System (ILS) software — circulation, serials control, acquisitions reporting, MARC record cataloging, materials booking — without significant customization (i.e. added cost).

You can use SharePoint out of the box to track reference questions, collaborate on projects, as well as publish newsletters, subject guides, and reports. But if you need to integrate traditional library functionality with SharePoint, ask your ILS software and reference database vendors about SharePoint add-ons.

2. *SharePoint has its own lingo.* Before jumping into SharePoint, you need to learn the lingo. For "field" say "column" or "property." For "controlled vocabulary" say "managed keywords." Where Google says "keymatch" SharePoint says "Best Bets."

Learn the difference between crawled and managed properties and how to match them up. Know what Web parts are and how to use them, such as Page Viewer, Content Query, RSS, Document ID, and tag cloud.

3. *It's about workflow, not content.* The whole idea of a library is to save money by leveraging materials and expertise across a

large population of users with similar needs and interests. The library's focus is on acquiring (or licensing) and providing access to content. With SharePoint, there can be hundreds of user groups, each with its own niche interests and unique business processes. Information can come from many sources, only one of which is the library and its information suppliers.

To serve users in a SharePoint environment, librarians need to think first about end user workflow and productivity — or create training programs and support services that help SharePoint site owners effectively weave library resources into their business processes.

4. *Three kinds of keywords.* Without any customization, SharePoint end users begin immediately creating a controlled vocabulary (managed keyword list) in the Term Store Management Tool as they populate their personal profiles and tag documents. That's because certain built-in metadata elements ("columns" in SharePoint-speak) are defined as managed keywords. These include Ask Me About, Skills, Schools, and Interests in the People Profile and Keywords in tagged document properties. Any values that users enter into administrator-defined metadata elements (custom columns) go into separate controlled vocabulary lists in the Term Store.

This leaves metadata managers with the task of merging values in the user-created keyword list (folksonomy) with values selected from an administrator-created list of managed keywords. The ideal is to do some metadata planning BEFORE end users start using SharePoint.

5. *The importance of people metadata.* Librarians use personal name authority files to distinguish one author from another and to track pseudonyms (e.g. "Twain Mark" see "Clemens, Samuel" or "Hardy, Thomas, 1748-1798" vs. "Hardy, Thomas 1830-1912"). In SharePoint

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2010, there is a great deal more metadata associated with personal names, and it plays a key role in the search system. For example, when a query term in a full text content search matches a value in the people profile, SharePoint displays information about the person in a sidebar on the search results page. Metadata in the people profile can also be matched with document metadata in the SharePoint Audiences function to display selected list/library items of interest to certain groups of users.

Librarians involved in optimizing the SharePoint search system need to develop strategies that encourage users to keep their profiles accurate and current.

6. Search engine vs. search system. SharePoint has a pretty good full text search engine (i.e. a Google alternative), but that's not the whole story. Although the search engine can be customized (see item 7 below), it's necessary to consider the other SharePoint features when optimizing search and discovery for a specific business process. These include site and document templates, navigation links, contextual and filtered search, search scopes, and integrated desktop search.

Librarians involved in search engine optimization and usability design need to know how these features work and how to use them to increase user productivity.

7. Sharepoint full text search can be customized. Why make users wade through thousands of documents in an All Sites search? Why accept the computer-generated blurb for each item in the search results when more meaningful data can be displayed instead? Why not add more relevant properties to the dropdown list on the Advanced Search page? Why not design custom search pages for different user groups? All these things can be customized by end users with a knowledge of XML.

8. SharePoint lacks a complete information ecosystem. Librarians work in a centuries-old information ecosystem. The system has a content quality pipeline that includes commercial publishers, professional associations, content aggregators and distributors, indexers, abstractors, and creators of bibliographic databases. It includes a system whereby metadata created by the Library of Congress and other libraries are electronically available in a format that makes it easy to classify newly acquired

content. Finally, it includes staff with at least one masters degree (and often two) who are expert at advising users on how and where to find information.

SharePoint is typically implemented in an environment that lacks this ecosystem — or even the knowledge that something like it is a necessary complement to the technology. The time is ripe for librarians to educate their business management and IT colleagues about the benefits of their information ecosystem — and to develop ways to adapt it to the SharePoint decentralized development platform.

9. A different metadata management model. Librarians use metadata repositories to describe and locate information (examples are online catalogs, bibliographic databases). In this model, metadata resides in a database that contains pointers to the actual documents or physical objects (i.e. books, maps, museum pieces).

In contrast, most application software (e.g. records management, enterprise search), uses an embedded metadata model, which facilitates computer processing but makes it difficult to share metadata among applications from different vendors. SharePoint 2010 is a hybrid of the two models. Its Term Store Management Tool allows metadata to be shared among SharePoint servers and applications but not among non-SharePoint applications (such as an ILS).

This leaves librarians with a dilemma: import and manage controlled vocabularies and topic hierarchies using the SharePoint Term Store Management tool or manage metadata in an external repository (e.g. an ILS) and periodically synchronize with SharePoint. For the pros and cons of different synchronization strategies, see the last session in our SharePoint 2010 for Knowledge Managers series.

10. SharePoint is a knowledge management opportunity. Librarians looking to expand their sphere of influence should view SharePoint as a great opportunity. Don't just think about how SharePoint can be applied to library management or be maneuvered into a peripheral role as taxonomist. Your knowledge of information ecosystems and your daily contact with the problems and frustrations of end users are essential to the goal of increasing SharePoint return on investment.#