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10 Things Knowledge Managers Should Know About SharePoint

1. SharePoint is an end user development platform.

That language is important. It means:

a. *SharePoint is targeted to end users*, whose interests are diverse and who need the education and support necessary to use it productively.

b. *SharePoint is a development platform*. There are lots of ways to customize its features, many of which can be done by end users with minimal help from IT (that's one reason it's so attractive to C-level executives).

c. *SharePoint is a platform, not an application*. Although many organizations use it first for collaboration, it can also be used for internal and external Web publishing (content management), document and records management, and business intelligence. It even has some metadata management capabilities. Tight integration among these features make the platform approach is more efficient — at least in theory.

2. Five levels of customization

SharePoint customization ranges from the very simple (e.g. adding an image to a Web page) to the complex (e.g. integrating an external metadata repository with the Managed Metadata Service). Between there are other levels of customization, including adding Web parts, activating built-in features, and customizing the search results page by changing the underlying XML. Only the most complex customization level requires a programmer. This is important because leveraging know-how often means tailoring it to a specific problem, workflow, or situation.

3. Templates are your best friends.

Before you do anything else, become familiar with SharePoint's out-of-the-box templates for sites, lists, libraries, and Web databases. In our courses, we give you screen shots and descriptions for most site templates, but the only way to really

learn about them is to play with them. If you find a template that does most of what you need and be easily tweaked to do the rest, you've saved yourself a lot of time — and your organization a lot of money.

4. People are the dog; content is the tail.

In previous versions of SharePoint, the focus was on migrating documents from shared folders into SharePoint libraries. With the 2010 version, the emphasis shifts toward people, with more comprehensive user profiles, the integration of people and content search results, and the ability for users to create and assign their own subject tags. The shift is subtle but significant. It means that knowledge managers should invest more in learning about user characteristics and SharePoint's impact on their productivity. It also raises the issue of how to incorporate information about people who do not have SharePoint accounts.

5. Beware of the terminology.

We've become accustomed to some of Microsoft's unconventional terminology (e.g. SharePoint "columns" are "fields" in the database world). The 2010 version presents new vocabulary challenges. For example, the term "keywords" which can mean 3 different things depending on the context. Sometimes it's a simple text field as a site column. Sometimes it's a controlled vocabulary term. It can also refer to a search query word or phrase that gets associated with one or more documents in the Best Bets function.

6. Dedicated applications are often superior.

If you're using other programs specifically designed for a particular function (e.g. corporate library management, competitive intelligence, records management), you may find that SharePoint falls short, at least initially. Remember that:

a. You can enhance SharePoint's out-of-the-box capabilities with customization or third-party

add-ons.

b. Even though your own staff may prefer their usual dedicated application, SharePoint may make your content and services more accessible to users outside your business unit.

c. Over time, SharePoint may prove its value in a rapidly changing business environment where social search and integration with desktop productivity tools (e.g. Microsoft Office) become increasingly important.

7. SharePoint is a search system, not just a search engine.

Although SharePoint has a decent built-in full text search function, its real power comes from integrated complementary features, such as inherited navigation, security-trimmed search results, people matches on content search results (and vice versa), and search results refinement based on topic hierarchies and controlled vocabularies. Therefore, to get the most from SharePoint, consider how all the features work together to deliver information into the user's workflow when and where it's needed.

8. Metadata is still captive.

The new Term Store Management Tool makes it easy to import controlled vocabulary terms and topic hierarchies, but once this has been done, the intention is to manage them within SharePoint. That's OK if SharePoint is the only metadata repository, but that's unlikely. In the first place, it lacks some basic thesaurus relationships and can't be customized. In the second place, most large organizations have multiple metadata storage structures.

Exporting terms from the SharePoint managed metadata requires a custom program and still doesn't solve the metadata synchronization problem. To achieve true metadata independence, you need to purchase a third-party metadata management program with SharePoint synchronization or you need a custom program to synchronize an external metadata repository with SharePoint.

9. Planning approach varies with intellectual asset maturity.

Microsoft's planning and governance approach is technology oriented and designed to provide the data that SharePoint administrators must enter and manage in order for the program to function. However, in most large organizations, SharePoint is only one of several development platforms. We find that organizations with mature intellectual assets — i.e. independent metadata repositories, content quality assurance policies and procedures, specialized staff — already have a head start when planning and governing SharePoint. Organizations with minimal structured intellectual assets, weak and/or informal information QA, and no content or metadata professionals may find that it takes longer to get a good return on their SharePoint investment.

10. Information ecology is missing.

Adding a taxonomy to SharePoint lists and libraries, customizing the search function, or using managed metadata as tag suggestions is not sufficient to increase SharePoint productivity, especially for external-facing functions like sales, marketing, and R&D. That's because the complex and specialized ecology created for traditional publishing is missing inside most organizations.

To see what I mean, go to Amazon.com and search for books about the problems your customers are trying to solve. You'll see a range of titles written from different points of view and targeted to different audiences. Each book uses a different organization scheme (look at the table of contents) and controlled vocabulary (look at the index). Then think about what needs to happen between the author's idea for a book and the appearance of the finished title in the Amazon.com electronic catalog. Finally, talk to someone at your local public library about their organization's role in acquiring, classifying, and providing user advisory services.

Few employees will be book authors, but many have expertise that needs to be shared. SharePoint has many sharing features, but it can be supercharged by adding and adapting pieces of the traditional information ecosystem.

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