

# How did you Learn SharePoint? From Bill Gates to “Click and See What Happens”!

**Abstract:** Jackie Fishleigh from Payne Hicks Beach recently undertook a project to implement a know how database of documents for the firm’s Company Commercial Department. Prior to starting she tried to find out how colleagues learnt to use the software and she discusses her findings in this article.

**Keywords:** software; knowledge management; law firms

## Introduction – What is SharePoint?

“Connectedness and openness” have taken over from “secrecy and empire-building” as keys to personal and collective success....

This is not a political statement but is a quote taken from a leading text on knowledge sharing, *Learning to Fly, Practical Knowledge Management from Leading and Learning Organisations* by Chris Collison and Geoff Parcell. SharePoint taps into this vision of knowledge sharing and effectiveness by connecting people, information and documents. SharePoint is Microsoft’s document management and collaboration software, or content management platform. I presume the name was chosen to mean a place to share and nothing to do with stocks and shares!

## Why choose SharePoint?

Because it is produced by Microsoft SharePoint is key to Microsoft’s software vision of the future and integrates with Windows Server software and Microsoft Office e.g. Word, Outlook, Excel etc. Bill Gates believes SharePoint will be as ubiquitous as Microsoft Office became in the 90s. The pricing is competitive and it comes as a package with Microsoft Office so that some less sophisticated versions are “free”. In these straitened financial times this means it practically chooses itself. It is relatively easy both for IT staff to set and for knowledge workers and end users to learn, or that is the theory!

## SharePoint at Payne Hicks Beach

We are currently running a pilot project in our Company Commercial department to create an “InfoBank” of KM documents on a SharePoint document library within a Team site. At one recent meeting I was asked how we could get training for SharePoint. Bill Gates? I suggested weakly. There was a very faint ripple of laughter. This set me thinking about how we were going to get our heads around SharePoint. So far all I had was a Dummies Guide which I had borrowed from IT. Having recently attended a session on SharePoint run as a collaboration between NetKX and CLSIG I knew many of us are now using SharePoint and thought I would try and find how people learn how to use it.

## How did you learn SharePoint ?

In August 2010 I sent an e-mail to Lis-Law and the BIALL Mailtalk as follows:

How did you learn SharePoint?

For example, did you:

- Read a book(s)
- Go on training – internal, external e.g. Microsoft free training videos at <http://www.sharepoint-screencasts.com>
- On the job – asked to set up team site, etc.
- Other

Many thanks,  
Jackie

This was based on a similar query which I had seen posted on a LinkedIn SharePoint group which received over 200 replies. The group in question is mainly populated by IT professionals. Unfortunately, many of the responses were peppered with impenetrable IT concepts and jargon. My own query was responded to by a mere 20 list members, but the replies were of more usable quality and interest to the legal information professional.

### **Which version are you using? Sheep or goat?**

It was important to establish which version was being used at the beginning of the exercise. This may seem obvious but the way the versions are numbered and configured can be quite confusing to newcomers and, if you have never used SharePoint, you probably will not have a clue what different versions should look like. I found out after some time that we are in fact using Sharepoint 2007 (without MOSS), rather than SharePoint 2003 as we had previously thought. It was quite a shock to find out we had one rather than the other.

### **Ways to learn SharePoint**

The following were all mentioned in the replies to my posting:

**Learning from someone else** – such as in house IT staff, a SharePoint consultant, a self-taught boss.

This is your classic “Sitting Next to Nelly” method, which always used to be my favourite because it tends to lead to the highest level of personal involvement, engagement and interaction. However having read the comments, whether this method works well is wholly dependant on how good a trainer “Nelly” turns out to be. In the case of the in house IT manager, he imparted the knowledge on a need to know basis which was a “slow process”. Another respondent was taught the basics by the IT department trainer, although this was described as “not ideal and the result was not brilliant”. This was better than the IT department just handing over a SharePoint site and saying “Here’s the site! Now you populate it”, or the IT department which had no resources to provide any training at all. The SharePoint consultant was able to answer any questions, while the information worker took notes but was nevertheless a bit too technical and the self-taught boss only covered the basics. Another respondent said that, when she is faced with a new product she always asks a fellow information worker who is using it in a similar application if they would be happy to provide a demonstration.

**Books etc** – in house manuals, small reference guides, Dummies guides (misleading title as these are not as straightforward as they sound!). Hard copy materials were not as popular as I imagined they would be. Heavy-weight texts were described as “developer-orientated”.

*Step by Step Microsoft Windows SharePoint Services* by Olga Londer and Todd Bleeker et al. was recommended. Whatever you do make sure you have the correct reading material for the version you are using!

**Online material** – Basic introductions to SharePoint on Microsoft website:

SharePoint demos <http://sharepoint.microsoft.com/try-it/Pages/demos.aspx>

SharePoint guides <http://msdn.microsoft.com/en-us/library/bb931739.aspx>

These typically last five minutes and feature a variety of presenters. If you enjoy accents you will probably like this method. The lady with the strong southern US accent is my favourite.

### **Wikis**

One information manager said her team had set up a Wiki for sharing eureka moments.

### **Hidden sub areas/site to experiment with**

This gives you a chance to experiment with SharePoint in a risk free setting.

The books on the market often contain lots of worked examples for you to try out as you get to know the system. If your IT department are site owners you will need them to agree what level of access you have to parts of the site. These are called “Permissions” in SharePoint.

### **Microsoft online Help!**

This is the white question mark in the blue circle in the top right hand corner of each page. Often better than using books, its strength is that it is written for the exact version you are using and deals with the issues that are likely to crop up on that page.

### **Trial and error and learning on the job – click and see what happens!**

However you learn SharePoint I predict that you will be topping it up with generous dollops of the above! In fact I would describe SharePoint as a journey and at times a pretty bumpy ride...

One respondent suggested that the main aim of SharePoint is control and avoidance i.e. making sure no one alters or saves anything to the wrong place. This may explain why it can be hard to work out how to do simple things on older versions e.g. without MOSS. I have not used SharePoint enough to really know if this is correct but it is certainly an interesting reaction. Is there enough there for some sort of conspiracy theory I wonder?

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### How about flying solo?

Learning on the job alone is not recommended.

### Courses: the free, the cheap and the expensive

#### Free events

These may contain a soft selling element e.g. Free SharePoint event – ClearPeople in partnership with Microsoft in London last Autumn.

#### Cheap events

These are run by professional associations such as UKeIG Intranet Forum meetings. The CLSIG/NetKX event I attended only cost £10 to members of CLSIG. If you get to know other delegates at these activities you may be able to keep in touch with them and exchange tips, find out what others are doing with it and even arrange a visit to see in person what your colleague is doing. SharePoint provides a great opportunity for practical networking and collaboration.

#### Expensive events

If you have exhausted all other options you may feel you need to book on an “expensive” course. What should you bear in mind? Make sure:

- It will cover the version of SharePoint you are actually using.
- It is focused on information professionals rather than IT people.
- It covers the material you are interested in learning and at the right level.
- That you have had a good hands on look at SharePoint so that you can get the maximum benefit from the course and ask any questions you have.

Providers which were recommended in this category were the Learning Tree <http://www.learningtree.co.uk/training-directory/SharePoint-Training-6.htm> and TFPL <http://www.tfpl.com/training/index.cfm?csI=sharepoint>, although it was pointed out that TFPL only cover the more recent versions of SharePoint. Outside London it is worth investigating local training providers who deal with Microsoft product training.

### Anything that works is good...

Based on what I gleaned from the IT Professional SharePoint list getting to grips with it involves many methods of formal and informal learning, experimentation, initiative and perseverance! There can even be a snakes and ladders element to it where you think you “get” something and then find all is not what it seems!

### Summary – it is all very pick and mix

A wide variety of methods are being used to learn SharePoint – some traditional, many employing new technologies and with different degrees of success. It is all very pick and mix.

Obviously different people learn in different ways. Without delving too much into what is a complex and quite an academic topic, it is almost certainly worth trying out a number of methods to see how you get on.

### Conclusion – avoid nightmares!

Gaining a good understanding of SharePoint is not something you can master in an hour, a day, a week or a month. It takes a gradual building up of knowledge over a longer period. It is worth investing whatever time you have available to understand it well. This will make it easier for you to train other staff and end-users and to answer the inevitable queries people will have. The good news is that SharePoint is here to stay and mastery of it is becoming a very valuable and transferable technical skill. While we remain in one of the toughest job markets for decades, spending time getting to grips with the version of SharePoint you have, and then any future versions will be a great way of adding to your professional skills. Unlike many of the electronic products e.g. Westlaw, Lexis Nexis library and PLC which are specific to the legal sector, SharePoint is prominent in organisations of all types up and down the country, and internationally, ranging from management consultancies and academic institutions to the Food Standards Agency to CILIP and the Scottish Government. I must say I do find SharePoint mildly addictive. I cannot guarantee that you will find SharePoint to be a learner’s dream, but I do hope this article gives you some pointers on how get to grips with it on the limited budget that most of us have these days.

### Biography

Jackie Fishleigh is Library and Information Manager at Payne Hicks Beach and is a past President of BIALL.