



A trainer's view: Discovering the powerful capabilities of Microsoft SharePoint

Why choose SharePoint?

Organisations frequently use Microsoft SharePoint as their document management and sharing solution. However, SharePoint has the ability to do so much more – it has six core applications dubbed 'The Six Pillars of SharePoint' – and in my experience many organisations often overlook the full catalogue of functionality. The software has the ability to act as a complete intranet, incorporating portals, company announcements and HR related tasks such as holiday bookings.

SharePoint can also:

- Serve as an enterprise-wide search tool. SharePoint can be configured so that document searches incorporate not only the SharePoint site, but the entire company infrastructure (network drives).
- Connect to external databases and display data from them.
- Store documents under version control.
- Remove the need for one administrative controller. SharePoint has the ability to assign responsibility of particular areas of the site to certain members of staff. Strong security tools also mean that user access can be restricted from some site libraries and folders.

Geof is one of Optimum's more technical trainers and is very skilled in advising clients on how best to build their reporting capability and get the most out of their data. Geof leads Optimum SharePoint course development and delivery as well as supporting the use of it internally. SharePoint is now a cornerstone of our collaborative working.

What are the main problems with adoption of SharePoint?

SharePoint's main advantage is also its hindrance: the software is infinitely configurable. It is hugely flexible, but that means that administrators need to know how to configure it properly and in accordance with organisation working environments in order to make it work properly.

The lines can become blurry between 'user' and 'administrator'. Since SharePoint allows organisations to effectively share administrative power and set various levels of rights, it can sometimes be difficult to segregate groups of people into one of two types of users. This can be a challenge when it comes to training, so any SharePoint training consultant needs to take the time to understand how each client organisation wishes to distribute power and accurately define user groups.

Obtaining user 'buy-in' is one of the biggest challenges during SharePoint implementations. If deployed half heartedly without effective communication and user training then it can be an expensive failure – people will continue to store documents on local drives, meaning the planned-for efficiencies will not be achieved.

'Wow' factors in SharePoint 2010

SharePoint documents folders, libraries and contacts can be displayed in Outlook 2010 and will synchronise so

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that you can access them offline. The synchronisation however is only one way, so documents updated via Outlook can't automatically update in the original SharePoint location.

The design of SharePoint 2010 is vastly different from previous versions, with a much cleaner look and feel. It also incorporates the Ribbon which characterises the Office 2010 applications.

The site is driven through pop ups – when forms need to be completed or files uploaded users no longer have to be navigated away from the main screen.

Training in practice – case studies

Case Study A – A UK-based charity wanted to run two customised courses for their administrators and general users. The charity only really used SharePoint for managing projects so there was a much more specific user base. The administrators did not need to learn how to create sites – more so views and permissions – so in this case we were able to deliver a 1 day course. Basic users were given a half day course.

Case Study B – A leading insurance firm use SharePoint through cloud computing, with the software hosted by Microsoft. They wanted to run an administrative course in just a half day session, but this was not enough time to cover all the fundamentals. We advised a single day of training for their administrators as, by the client's design, the Microsoft hosted solution did not have as much functionality as our standard course covers.

My recommendations

Those users who are going to be giving substantial administrative power (to edit and create views, lists and libraries and to grant user permissions) and who need to understand the basics elements of setting up a good working site need to attend a minimum 2 day training course. There is a lot of content to cover given the freedom of customisation in SharePoint that 1 day is not enough to effectively train these types of users.

Users without administrative power usually benefit from a half day introductory course, learning how to upload, download and share documents, as well as setting up personal views. For those who have a very restricted use of SharePoint (i.e. just accessing documents) then quick cards with a step-by-step guide is likely to suffice.

Training users ahead of the go-live date helps to identify how best to design and customise the site; workshops and courses will give staff the opportunity to give their opinion on how best SharePoint should be configured to make their document sharing experience simple and productive.

Working out the structure of your SharePoint site early on will help to ensure successful use of it in the long-term. Going forward, site managers need to keep tabs on the way it develops – SharePoint can grow organically through administrators adding new libraries and if this is not policed well then it can grow out of control!

Get the balance right with permissions – not giving a team of administrators enough rights defeats the point of having SharePoint; giving too many people too much power will cause a conflict of interests.

For those being introduced to SharePoint for the first time, eLearning doesn't lend itself well, as there are too many processes to learn to fit into a 30 minute piece of learning. However, if users want to learn specific processes, or a small element of SharePoint's functionality, then eLearning and video tutorials can be considered.

For more information about our courses visit: www.optimumcomputertraining.co.uk/Microsoft_SharePoint

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