How to Use SharePoint as a Self-Help Knowledge Center

Produced by AIIM Training

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Introduction

The challenge of any new system, and SharePoint is no exception, is getting people comfortable enough that they will return, use it, teach themselves, and encourage others. By having a self-supported system, with access to online training materials for the basics, support/helpdesk calls are largely reduced.

The other challenge is inspiring people to share what they learn with others and to document as they go. As with any acquired skill; we all forget very quickly how hard it was to begin, and how easy it became with time. Tools like wikis and FAQ forums all assist in capturing and sharing the knowledge from the whole team.

People have different styles of learning. Some love to teach themselves; those people need adequate links, resources, and the capability to allow that. Others need guidance or hands on training such as product-specific training. For those users, who we'll not discuss in this paper, the SharePoint site should feature links to available training materials and courses with applicable schedules and costs. But for self-motivated users, SharePoint can provide a number of opportunities for self-help and continuous improvement.

Identify the Site Owner

One simple addition to any site is to promote the site owner – the first point of contact for help if users need to deal with someone personally, rather than attempting to resolve their issue alone.

Contact me for help on this site!
Click my name for full contact details
June Edwards
CEO

web part on each site

Example for contacting a SharePoint site owner.

For self-motivated users, SharePoint can provide a number of opportunities for self-help and continuous improvement.

The site owner is a Web Part that can be inserted on any page, and customized to show what you need it to, including various contact mechanisms. Having contact information adds a personal touch, as well as reinforcing the contact(s) role(s).

Connecting With Others

There are a lot of ways to encourage self-help amongst peers.

- My Sites: Start using the My Site features to see what content has been tagged or recommended by peers. Find skills appropriate to needs. Post notes for the person concerned. My Sites also allows users to identify their own particular skills and areas of expertise, which is then available for others to search on.

By networking with fellow colleagues you can often find how someone in another department has solved a simple solution, improved some business process or done something using SharePoint that could be of value.

- Note Board: Use the Note Board to post comments relevant to a site or page or to connect with people. This is a Web Part that can be added to any page.

- Blogs: Encourage the practice of blogs to communicate internally and share knowledge. Help is often found from reading what others have learned. And other users can also subscribe to RSS feeds on blogs, as well as other sites and reference materials. SharePoint comes with blogging functionality out-of-the-box to allow for easy publishing, linking, and embedding.

Search on Skills

The people search allows you to see people who have skills in a particular area. These will be listed automatically based on the search criteria entered. It does of course presume people are entering the correct information about their skills or areas they want people to "Ask me About."
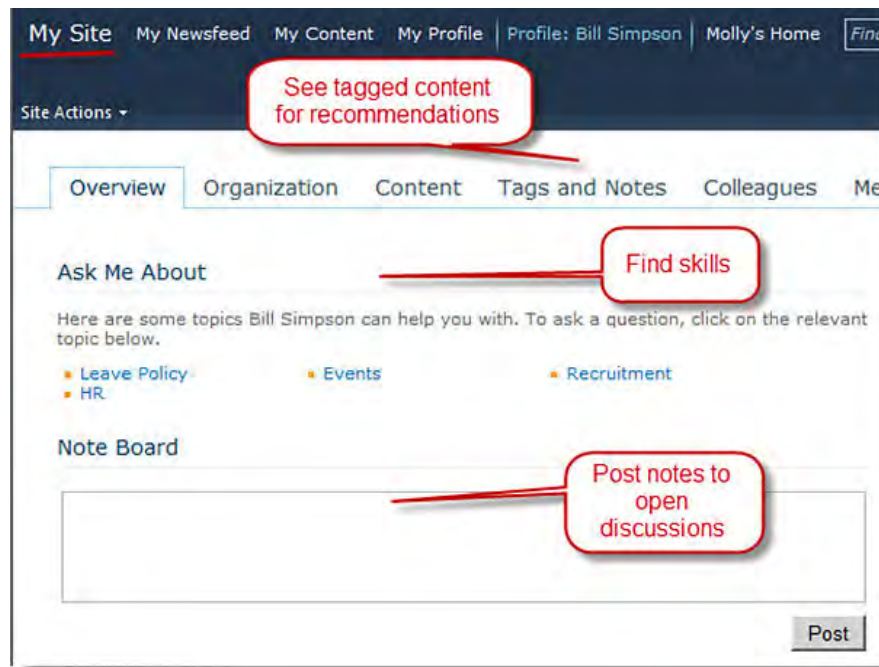
Example of how to use My Sites to enable self-help by using notes and the ability to list one's own skills and find others' skills.

By networking with fellow colleagues you can often find how someone in another department has solved a simple solution, improved some business process, or done something using SharePoint that could be of value. As the reach of networking grows; the better the results with training, self-help, and continuous improvement of a SharePoint site.

Set Up a Knowledge Base Using a Wiki

One challenge is that people leak knowledge: people forget (very fast!) just how much they have learned. When users work together on a project, the way it often works is that users join a project site, get immersed in the work of the project, learn a ton in the process - but then nothing gets documented and the knowledge gained is lost.

Start a wiki on day one - as part of "walking the talk." As part of the project site (or a fully functional knowledge site), begin a knowledge wiki specifically for everything people learn about the project. Similarly, SharePoint itself is a likely topic for a knowledge base and one of the ways people will learn SharePoint is to use it for projects and for knowledge sharing.

This will be invaluable later as a self-help tool when it becomes part of the published wiki for SharePoint. Every time a team member asks "how do I" or "why?" get them to add a wiki page - users often forget just how much they've learned and what they know.

More importantly, what users document is often very much in alignment with and specific to the organization rather than simply being generic content. The lessons learned along the way may not be found in online searches, so users' own explanation and documentation has more practical application, and therefore becomes more valuable to other employees.

Productivity Hub

The Productivity Hub is a free downloadable resource from Microsoft. It is installed as a stand-alone site collection, and can be attached to any SharePoint sites as a place for resources, help, videos, and other content.
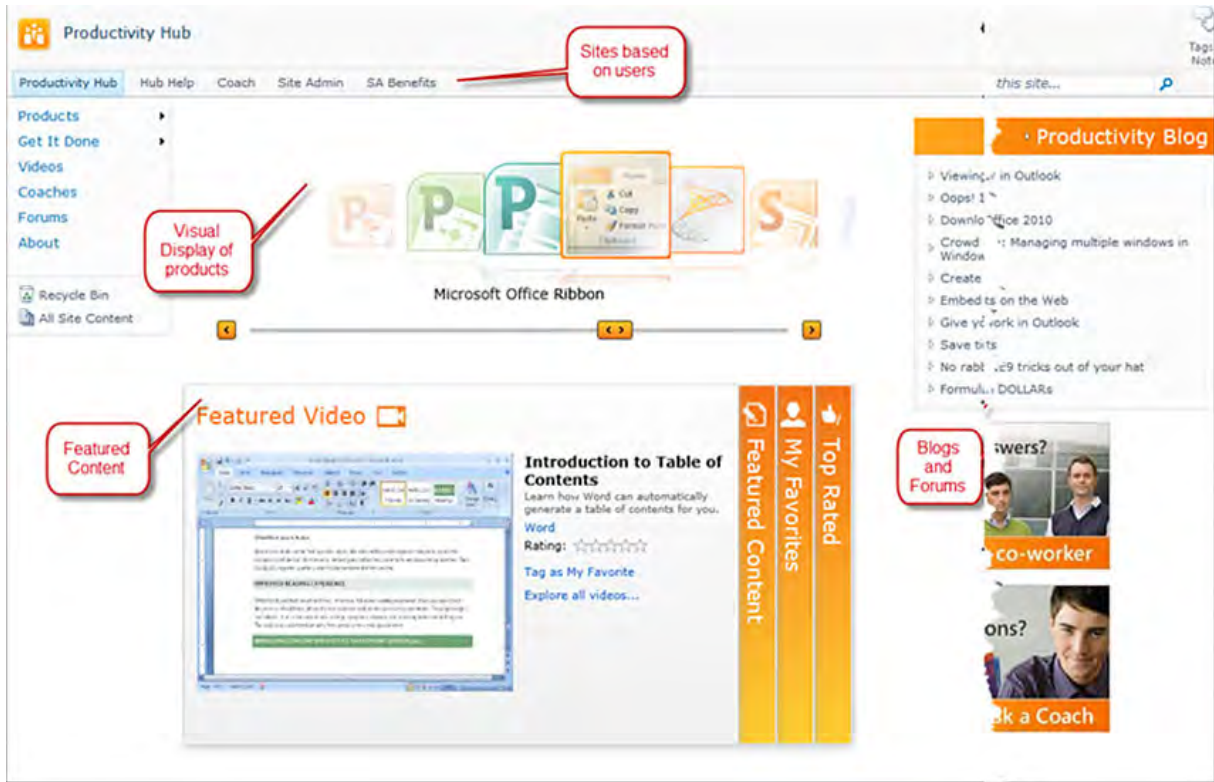
The Productivity Hub, out of the box.

There are also a large number of Office and other product content packs, which provide immediate documents, videos, FAQ's, surveys, and more, that organizations can choose to include or exclude from the Productivity Hub installation.

The main advantage here is that the Hub is a great starting point for a HELP SITE. The team can install it, rename it, add to it, filter it, or choose to use only parts of it; but why start from scratch?

The Productivity Hub is SharePoint, so for anyone who needs to maintain it and add to it, it is all familiar territory – lists, libraries, pages, and sites that content editors and site administrators already understand. This means they can add to it effortlessly, without needing to learn a new system, and can customize the layout, the categories, the terminology and the brand, to suit the needs of the site users or of the organization.

The Productivity Hub can also include information from other systems, products, or processes the organization wants to provide resources for – i.e., not just Microsoft products as shown, or just SharePoint. Organizations without a central hub for these types of resources can use the Productivity Hub for this. Add to existing survey questions, or create your own, knowing that the structure is all in place. Upload new documents and link them to existing content. Add specific video how-to clips from existing sites, so they are personalized and relevant. And so forth. ALL the training materials can be added to this one centralized place, to provide a consistent approach to providing self-help for users.

By default, the Productivity Hub comes with the following resources (partial list):

- A library of videos play automatically once selected - short snippets of how to information.
- Hub help provides FAQs in an easy to read and navigate format.
- Forums allows for team discussions specifically related to topics.
- Coaches can be recommended for certain topics and their contact information made available through the Hub.
- There are surveys already installed for some of the products, where people can test their own skills and results are recorded.
- Learning paths help to define what is required in the provision of help for a specific product.

Decide on a Support Structure

Develop and publish this, including the availability of people and hours for support.

The support structure will often consist of a number of tiers. Self-help is the first one, and includes online user guides, video clips, the Productivity Hub described above, reaching out to other people, and finding the information themselves.

The next tier includes business champions, or people within each department who can support and help others with their particular use of SharePoint. They are subject matter experts for their area of knowledge. The site administrator may also fall into this tier and may be listed on the site. The help is for general how to and troubleshooting, site access, and permissions queries.

Tier three is often the general IT or service helpdesk within the organization, depending on its internal structures. The training department sometimes has a help or on call element for Additional Training or New People/ Induction and so on. Where something is a bug and needs escalation the IT department becomes part of this level.

Why Provide Self-Help?

Providing self-help is one of the key ways to reduce support calls and empower people to learn on their own and feel comfortable with the new solutions implemented in the department or organization. Even for those who aren't best suited to learn via self-help in the beginning stages of training; self-help is an excellent way to reinforce what's been learned (but momentarily forgotten!). Just remember to make it easy for people to find help, get help, and learn for themselves.

SharePoint Training Program

About AIIM's SharePoint for Collaboration Training Program

50% of organizations that use SharePoint use it for internal collaboration*

SharePoint can help your employees work more effectively together. You know that. In this paper, you've learned how SharePoint can help provide self-help to your employees. AIIM's SharePoint for Collaboration Training will show you the ins and outs of how to take advantage of the full collaboration capabilities of the SharePoint tool; allow users to use familiar tools to collaborate like Microsoft Outlook, Office, and Visio; provide support to users; and integrate social technologies like wikis and blogs into the SharePoint collaborative environment.

World-Class Professional Development and Training

Why should you become a SharePoint for Collaboration Practitioner, Specialist, and Master?

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing collaboration initiatives using SharePoint 2010
- Discover real-world solutions and best practices for challenges you face

Education Around the Clock . . . Or In Person

Learn at your own pace and at your own convenience by taking the courses online. Available 24/7; learn as you have time. Classroom instruction—both public courses and private courses delivered to you—is also available.

Master Collaboration Using SharePoint.
Start Today.

*Source: AIIM's Industry Watch The SharePoint Puzzle – adding the missing pieces

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AIIM (www.aiim.org) has been an advocate and supporter of information professionals for nearly 70 years. The association's mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. Founded in 1943, AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community, with programs and content for practitioners, technology suppliers, integrators and consultants.

About the Author

Jesse Wilkins joined AIIM in 2010 and is the Director, Research and Development. He is responsible for the development and management of a number of AIIM initiatives including the AIIM Social Business Roadmap, the AIIM Social Media Governance Training Program, and the Certified Information Professional certification. He is also an instructor for a number of AIIM courses.

Prior to joining AIIM Wilkins spent 15 years in the information management industry as a consultant, solution provider, trainer and end user, most recently as a principal consultant with Access Sciences.

Wilkins is a sought-after speaker at conferences and events. He frequently speaks and writes on electronic records management, digital preservation and social business-related topics. He holds a bachelor's degree from the Metropolitan State College of Denver and has received a number of industry credentials and designations including the AIIM Certified Information Professional, the CompTIA CDIA+, the ICRM Certified Records Manager, the Xplor Electronic Document Professional and the TAWPI Information Capture Professional.

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