

Signaleers share front line experiences

Microsoft SharePoint integration a missing element

By Ron Bascue

As the Army transitions to Microsoft SharePoint as its primary enterprise knowledge sharing environment, units are finding the transition to be challenging at the user level.

Integrating SharePoint into daily operations is helping improve organizational information flow and allowing easier access to a common knowledge base. Simultaneously it is reducing e-mail traffic with file attachments and helping move away from undisciplined, disorganized shared drives. Other benefits include a more organized, disciplined collaborative environment allowing users: to share common calendars; create wikis for standardizing SOPs and OPORDS; develop blogs with viewer commenting ability; customize workflows to improve business processes; create various views of the same data set for different audiences; design informational dashboards to improve situational awareness; take advantage of the ease of integration with other Microsoft products; as well as a plethora of other capabilities.

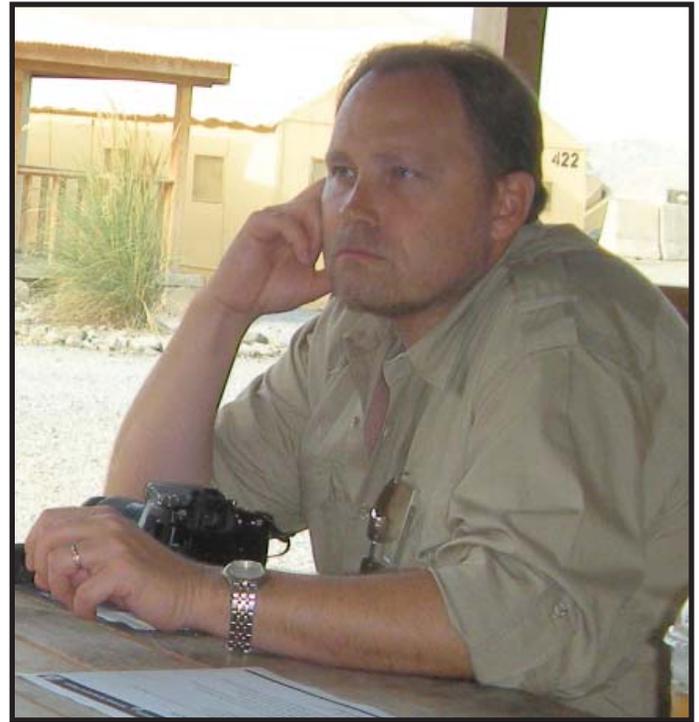
The problem I've observed with the transition is the day-to-day users of SharePoint do not see the benefit of all these capabilities.

It's not until the unit realizes that e-mail attachments are still the primary information sharing method and that shared drive sizes continue to grow at an amazing pace that the question - "what went wrong?" - is posed?

The answer comes from a common practice in the Army of deploying software with no training strategy and expecting the users to either "learn by doing" or to take the initiative to seek out training opportunities. This may seem like a more cost effective method to get your organization trained and ready to use the capability. However, when you start comparing the personnel hours spent in discovery learning with the amount of lost productivity, there is no real return on investment.

While conducting research for this article I sought an internal organization (the CIO/G-6) or school that provides authorized and certified Microsoft SharePoint trainers and courses. Attendance could be either attended in residence or delivered via mobile training teams. Instead I found several commercial companies offering to provide contracted training - at a significant cost - with a list of several satisfied customers, frequently including the U.S. Army.

With the lack of trained users, most units are integrating SharePoint without fully understanding the benefits of the tool. At best, units have a few individuals who take it upon themselves to learn enough about SharePoint to become the resident experts. However, a more common scenario is units are contracting SharePoint expertise, making them dependent on outside experts. This



Ron Bascue, knowledge management integrator for Regional Command (East)/Combined Joint Task Force 101 in Bagram, Afghanistan takes a break from his duties in Afghanistan.

approach can work if each contractor has similar skill sets and contractors don't rotate out, leaving a gap in the unit's support.

The challenge now becomes getting the users trained on the software as quickly as possible so operational momentum isn't lost. The initial thrust of the training needs to focus on the basics: how to build lists and libraries; what Web parts are and how to use them; how to manage permissions and archive documents; etc.

Recommendations

It is recommended that organizations develop a training strategy for SharePoint deployment that takes into consideration the following phases:

1) Instructor-led training during initial deployment. This ensures the day-to-day users learn the tool well enough to understand and take advantage of most of its capabilities. It also helps build a cadre of subject matter experts for others within the unit to consult for help.

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- 2) Use of e-learning sites like LandWarNet eUniversity, Skillsoft and Microsoft's Office Website. These are staples in improving proficiency and can be used for "refresher" training as needed.
- 3) Use internal training and local learning centers to introduce the tool to new arrivals to ensure they have a basic familiarity with the software and know how it is being implemented within the organization.
- 4) Create a collaboration community to support continued development and to help users find solutions to challenges as they find new, creative methods of using the tools.

A strategy like the one described above would have helped CJTF-101 as they deployed their SharePoint portals to Regional Command East (RC (E)) with very little user training or operational experience. CJTF-101 used Microsoft Office SharePoint Server (MOSS) 2007 as their operational information sharing tool in theater but during deployment preparation user training was not a primary focus. It wasn't until after several months in theater that the organization as a whole became comfortable enough with the tool to start looking for new ways to make it work for them.

And even though CJTF-101 successfully transitioned several staff processes to their SharePoint environment, there is still a need for training on the tools. While initially thinking that training a deployed headquarters would have ensured a much more focused audience, the real thrust of the training should be during deployment preparation, when OPTEMPO is lower and the students can focus on process improvements instead of Soldier survival. Any training on SharePoint needs to include context though. Every unit/section will use the tool differently and have challenges like no other, so generic training is only useful in the initial stages; everything after that needs to be tailored to the unit/section or the individuals. This type of training is more challenging because it takes time to know the unit and its issues before a training plan can be developed. This is where the Knowledge Management Office can support the integration plan. The KMO should be attuned to the knowledge environment needs of the organization because they have been conducting assessments and capturing gaps in capabilities and identifying solution sets to fill those gaps. The KMO should have a close working relationship with the Information Systems Managers

and be aware of the electronic challenges that hinder knowledge and information flow. With the two section's broad view of the organization, they would be able to help the trainers develop a training plan that is suitable for each staff section or subordinate command. The KMO should ensure this training team is tightly connected with the unit SharePoint administrators and web developers. These individuals are in the best position to understand the daily needs of the staff sections and should know what training is needed. Another consideration is to ensure training is not only tailored for context, but also adjusted to meet the different tasks Soldiers will execute on the portal. Training would be established based on the type of user: basic, power, site administrators and site developers.

This recommendation is a short term alternative until the CIO/G-6 fully implements their vision of the SharePoint enterprise and TRADOC incorporates SharePoint training (and usage) into the institutional training model. Until then, units will continue to deploy their portals with limited user training, leaving them to continue learning while doing and not getting the full benefit of the tools.

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Training Material Locations

LandWarNet eUniversity blackboard Microsoft Office 2007 Core Training (LWN-EC-MELL):
https://train.gordon.army.mil/webapps/portal/frameset.jsp?tab_id=_2_1&url=%2Fwebapps%2Fblackboard%2Fexecute%2Flauncher%3Ftype%3DCourse%26id%3D_2072_1%26url%3D

SkillSoft training: Microsoft Certified Technology Specialist: Microsoft Office SharePoint Server 2007, Configuration