Showing the Way in SharePoint: What Every Librarian Should Know

Betsy Rolland, MLIS
Project Manager, Asia Cohort Consortium Coordinating Center
Fred Hutchinson Cancer Research Center, Seattle, WA
BRolland@fhcrc.org

Emily J. Glenn, MSLS
Information Specialist & Library Services Coordinator
Seattle Biomedical Research Institute (SBRI), Seattle, WA
Emily.Glenn@sbri.org

Many life sciences organizations have deployed Microsoft Office SharePoint Server-based collaborative portals for communication and data sharing. A collaborative portal can streamline the management of distributed scientific research. However, getting beyond the basics and using out-of-the-box features of this powerful software can be overwhelming. Following a planning and development process grounded in information services competencies can help information professionals build and support portals that are sustainable and usable collaborative research spaces.

Why Portals?

- The overhead of collaboration is reduced by spreading the burden over entire set of participants
- Information resides in a centralized repository
- A shared workspace builds community and trust
- Contributing gives participants a sense of ownership of the collaboration output and fosters greater dedication
- Tracking and recording of assets and artifacts is simpler and becomes a group responsibility

Planning for a Portal

Start with a set of simple questions about collaborative work, communication, artifact organization and recall, and tracking activities to ascertain your user'

Collaborative Work

What are the structure and culture of your collaboration?

* Relationships
* Participant roles
* Contacts
* Locations
* Meetings
* Cultural preferences

Communication

What requirements or goals exist for dissemination of information?

* Announcements
* Revision notes
* Discussion board
* Decision recording
* E-mail
* Wikis

Artifact Organization and Recall

What are the products of your work?

* Presentations
* Publications
* Documents
* Images
* Wikis
* Posters

Tracking Activities

What needs to be tracked or recorded and in what format?

* Calendar events
* Approval records
* Shipping records
* Project management
* MTAs
* Reports
* Milestones
* Tasks

Portal Development Process

An Information Specialist leads the development of an effective information space by combining knowledge of the organization and project with expertise in information services, tools and technologies. Which technologies match the project and participants?

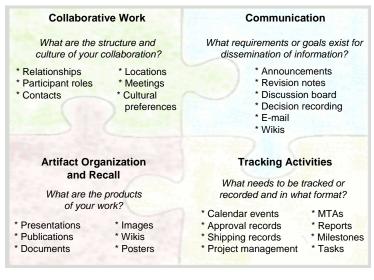| Phase	Information Specialist Role
Requirements Gathering	Meet with clients to determine requirements for collaboration
Development & Testing	Iterative prototyping, development, functional testing and usability testing of: • Information architecture • User Interface • Functionality and features
Deployment	• Execute rollout, communications, maintenance and user adoption plans • Meet with clients for final sign-off on functionality and user interface • Conduct user training • Write project wrap-up report with lessons learned
Maintenance	Implement maintenance plan

Wiki Pages and List Features

- Create a wiki using basic wiki markup and HTML
- All wiki pages are stored a list items; manage items in bulk
- Topic selection supports presentation of similar items

Select topic

Insert URL and description for embedded navigation

Collaborative Databases

- Use for sharing complex sets of data and previewing relevant sets
- Metadata provides category filters to drive views for users
- Versioning captures changes for each record

Show or hide fields

Data Review Workspaces

- Use for virtual review of data analysis by collaborators
- Transparent, private access to reviewers only increases trust
- Context-rich environment brings project pieces together

Clear review instructions

Discussion link

User transparency

Documents for review