White Paper

The Value of
SharePoint Help in Context

June 10, 2014

VisualSP™

V irtually every organization that relies on a Microsoft infrastructure has some version or versions of **SharePoint**, Microsoft's collaboration and content management platform. Hundreds of thousands of enterprises around the world have implemented SharePoint to support at least some business processes.

SharePoint acquires its value through the ways innovative users adapt and build useful things with it – from simple content repositories for teams, to large-scale systems that track sophisticated business processes. SharePoint also is a sophisticated development environment, supporting enterprise applications and, most recently, large-scale cloud deployment. SharePoint adoption has been driven by:

- **Its wide range of application.** Any function or team can adapt SharePoint to its own processes.
- **The promise of end user autonomy.** SharePoint has long offered organizations a unique bargain. For IT departments, it suggests a way to reduce the number of applications that need to be supported, and the attendant costs. IT accepts the responsibility for maintaining an always-on SharePoint infrastructure; because SharePoint is perceived by IT as flexible and easy to use "out of the box," IT can shift the burden of application development and maintenance to the end users themselves, who then create and support their own tools. For those business users, the bargain is freedom from the command and control limitations of the CIO.
- **Social functionality.** Recognition of the social nature of many business processes has created growing interest in applications with social features. Microsoft has invested heavily in maturing the blogging, wiki, tagging, rating, profiling and other social features of SharePoint. These are genuinely competitive in the social media tool market with the advent of SharePoint 2013.
- **Increasingly, utility as a cloud solution.** Office 365, in the last two years, has brought SharePoint into the cloud-based, software as a service (SaaS) arena.

In many organizations, however, SharePoint is widely deployed but narrowly adopted.

That is, the platform is available to business users, but its actual use is not widespread among people who are effective in their jobs but unenthusiastic adopters of collaboration tools – or of new technologies generally. The business user empowerment that SharePoint offers comes at a price: It requires more end user training and coaching than its champions might expect. To put it succinctly, *SharePoint adoption is often harder than it looks.*

This disconnect can create painful experiences for organizations that have made the decision to adopt SharePoint at the top and then pushed the platform down to line of business users and their managers. Organizations committed to such decisions will often "burn the boats" once the decision is made. One major IT hardware manufacturer determined that SharePoint would provide greater control over the growth of storage consumption, so it shut down the file shares that employees had depended on for decades, insisting that they store their content in SharePoint sites instead. Users who successfully adapted their processes to the new platform were fine; employees who had difficulty with SharePoint ended up storing their documents in email folders or their own local C: drives, beyond the reach of collaborators and, equally importantly, out of sight of corporate records management stakeholders.

Why adoption is difficult

Several aspects of SharePoint can frustrate potential adopters:

- **Organizations have misconceptions about what business users can do on their own with SharePoint.** Managers and IT are unrealistic about the simplicity of SharePoint and the skills and initiative of their business users. Business users, for their part, are not motivated to learn to take advantage of new technology. Many kinds of knowledge workers are close monitored for productivity – the business process for which they are responsible is subject to detailed performance metrics, and the hours they spend on specific activities are measured. These workers actually are motivated not to spend time on learning new things, if it means the metric on which their compensation is based has to suffer.
- **SharePoint is a blank slate.** Its utility is not immediately obvious to end users, for whom adapting their daily business processes requires imagination. They frequently find themselves asking, "What's in it for me to adopt this system? How do I benefit?"
- **People don't like the "SharePoint look and feel."** Employees often are expected to adopt a new business tool crafted internally in SharePoint, as a replacement or substitute for a more polished commercial application. People often resent the compromises inherent in this substitution, for what may be good reasons – an internally developed solution may not have the ease of use that a commercial tool offers, and (importantly) *a homegrown SharePoint tool is likely to be documented poorly, if at all*. But the way people typically express their concern is to say they just don't like the characteristic "look" of SharePoint.
- **Building tools in SharePoint is harder than it seems.** While virtually anyone can learn to set up a Document Library or List, users frequently are confused by the functions that distinguish a simple repository from a functional business tool: Search, page layout, the use of web parts, views, filtering and the like. SharePoint's Permissions Model, simple as it is in concept, mystifies end users. And many functions (workflow, master page design, conditional formatting) are plainly beyond the understanding of business users.
- **Organizations commonly fall short in providing end user training.** Many companies have adopted a "self-service model" for site collection provisioning – that is, if a user needs to create a repository or tool in SharePoint, he or she can order creation of a site collection automatically. This simplifies provisioning, but it fosters a business norm that SharePoint end users are on their own. No administration resources are provided, and line of business teams must find their own training resources, beyond a finite collection of recorded materials in IT's inventory. Conventional training, moreover, often fails. It is expensive on a per user basis, and managers often are disappointed with the results. Users quickly forget what they have learned.

SharePoint Help is weak

Onboard help in SharePoint is minimal. SharePoint content is available from the Microsoft Office help system shared by all Office components. Search within the help content is rudimentary, the available content about SharePoint is basic, and there is no straightforward facility for updating it or adding custom content to it.

A new feature in SharePoint 2013 is the **Site Collection Help Feature**, which enables a sophisticated user to create a custom help content library. A user with site collection administrator rights can create a library of custom help content. Activating the Custom Site Collection Help feature creates a Site Collection Help library that can contain various types of files, including media files. Within the help library, the content can be organized in Help Collections by topical area, and within each Collection the user can create Help Categories, which can be further broken down into multilevel folders.
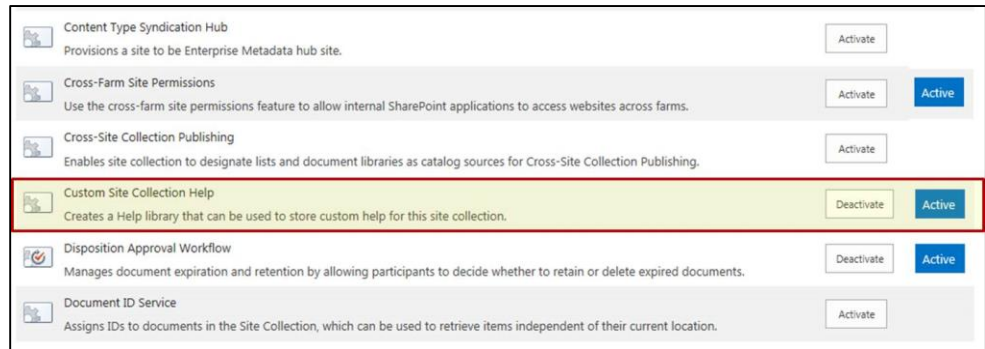
Once the Help Collections are generated, the administrator must select the Collections in a settings window. From then on, the feature will add a menu of Site Help topics – displaying links for the custom Collections.

The Site Collection Help feature is a step up from past versions of SharePoint, but it has important limitations. It is created for the Site Collection, and is displayed only within that site collection. Organizations with help content that is relevant to multiple site collections will have to recreate the help content library and deploy it for each collection. Moreover, the content is displayed in the same way for every page in the site collection. What it clearly lacks is *context sensitivity* – if a content item is relevant only to one SharePoint context (e.g., relevant to a user in a Document Library, but never in a List), there is no way to filter the view so that the item only displays as a help topic if the user is in that context (in a Document Library).

Impact of weak adoption support

When an organization makes a significant commitment to a productivity tool like SharePoint but stalls during the adoption phase, the impact can be quite severe. At very least, the company will see a temporary loss of productivity as end users fall behind in their "real work" while they teach themselves to use SharePoint.

Inadequate onboard help will increase the burden on the help desk, requiring enough IT staff specifically trained in SharePoint support to handle what may be a substantial volume of calls. SharePoint is not an especially difficult platform to support; while there may be errors in the infrastructure, it rarely breaks in a way that calls for a technical fix. But, as is true with other technologies, the predominant burden on SharePoint Support is likely to be responding to "how-to" questions – typically 80 to 85% of any service desk's volume, according to John Custy, founder of JPC Group, an IT Service Management consultancy.

In many large organizations, end users typically bypass the help desk altogether, having found it slow to respond to questions or lacking in-depth knowledge in domains like SharePoint. How else do people get

help? They may "prairie-dog" – popping up to lob questions over their cubicle walls – or network online with peers.

But studies suggest ***the most common way end users get an answer when they have a technical question is to "just Google it."*** In a recent independent survey[1], <u>more than 60% of respondents</u> indicated a Google search was their first choice for how-to inquiries.

This would be fine if business users were uniformly good at searching. As it is, searching for information is one of the worst time burdens on employees, a pattern with obvious implications for productivity. According to a 2008 study sponsored by Google, knowledge workers spend 25 percent of their time searching for information – and that figure accounts only for successful searches. Those same workers spend another 9 percent of their time on *unsuccessful* searches[2]. That's two hours of every eight-hour workday searching, plus an additional 43 minutes of utterly wasted time. And simply Googling for advice introduces an entirely new source of risk because so much of what is available from SharePoint-oriented blogs and other informal sources is ineffective, unreliable or plainly wrong.

In addition to lost hours, inadequate user guidance leads to errors in implementation and costly rework. These issues can manifest themselves in deployment errors, such as:

- Disorganized content, hard to find for those who need it;
- Permissions errors, denying access to people who legitimately need it, or mistakenly giving access to confidential content to unauthorized users; and ultimately
- Failure to realize ROI.

The Solution: Help in Context

Given the difficulties faced by business users expected to make their way through SharePoint adoption with minimal training or support, and the expensive consequences of lost time and deployment errors, the most direct solution is to provide the feature the native SharePoint most conspicuously lack: **An onboard, context-sensitive help system – help users need, when they need it.**

An onboard help system – one built directly into the SharePoint user experience – would be quick and easy to find and use. Optimally, it would take advantage of SharePoint's familiar "tab" metaphor, consistently provided in an instantly recognizable **Help** tab.

Context-sensitivity would make access to the right guidance faster and less confusing, as users would be offered the most relevant topics for whatever they happen to be trying to do when they request help. **Context-sensitivity is one of the most frustrating gaps in the "out-of-the-box" SharePoint help facility.**

The ideal Help solution would provide a large library of content written in end user language. High-value help content would be:

- **Comprehensive** – Explaining a wide variety of SharePoint features, functions and issues;
- **Reliable** – Provided by a trusted source;

- **Up to Date** – Supporting the addition of regularly updated content;
- **Multimedia** – Including text, audio, video, images, screen shots, tip sheets and other content, effective for all learning styles; and
- **Extensible** – Providing the ability to add new, custom content as needed.

Enter VisualSP™

More than 250,000 end users now have the benefit of custom support and training content (videos, documents, images) exposed directly through the SharePoint Ribbon, using **VisualSP**, from SharePoint-Videos.com.

VisualSP is a software solution installed at the farm/web front end level, providing a uniform, context-sensitive user experience across multiple site collections. Unlike native SharePoint, it provides help content from a Help tab that blends into the user interface and presents a menu of topics specific to the functional context – e.g., a List, a Discussion Forum, a Document Library – and only those topics most relevant to the user in that setting.

VisualSP ships with 105 stock video tutorials, reference documents and "tip cards" to plug-and-play in the product directly. The tool is designed for the addition of new content at will – additional files from SharePoint-Videos.com or any other publisher, as well as custom content developed by the end user organization. Content can be hosted locally or streamed from the web.
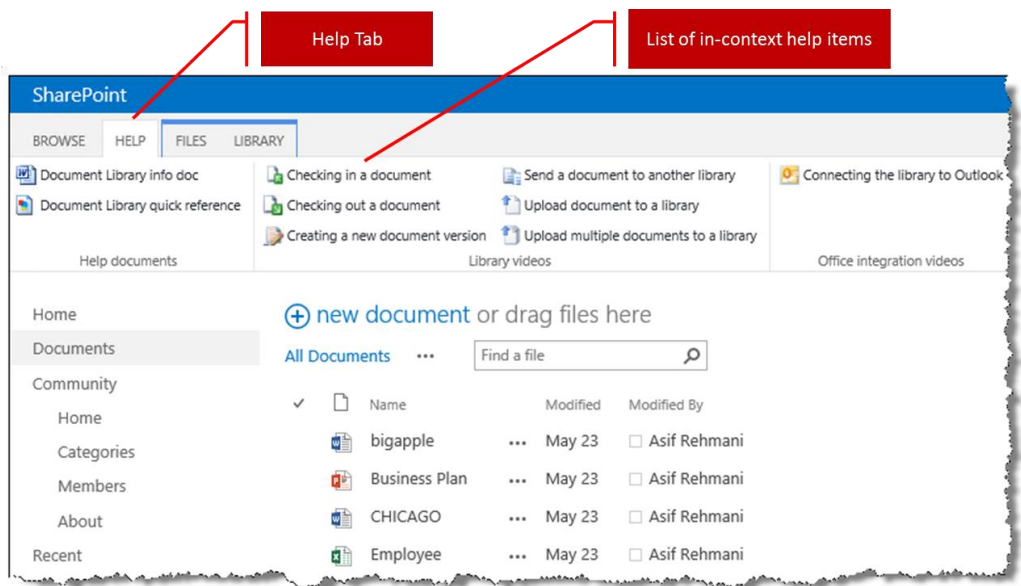

Figure 1: Help through the SharePoint Ribbon

Simple implementation

Any user with administrator rights at the farm level can install VisualSP. The entire content collection will be immediately and uniformly available in all site collections on that farm. Any site collection deployed on that farm will have, by default, an active VisualSP site collection feature. If desired, the administrator can turn off the Help tab for any site collection simply by deactivating that feature.

Context-sensitivity is managed through **Manage VisualSP Help Items** settings. Content is grouped in collections according to the apps for which each content item is relevant. For each context, the administrator chooses the relevant content by checking boxes for the appropriate scope.

Figure 2: Help Item Configuration – support for multiple formats

VisualSP's stock content includes brief, fully narrated videos designed for easy consumption by end users and resolving common SharePoint questions. Hundreds of additional video files, including longer, more in-depth videos on many SharePoint deployment topics, also are available. Further, VisualSP will easily absorb internally developed content relevant to the organization's own SharePoint infrastructure, as well as help on specific applications built by the team, in house, increasing the likelihood that these custom tools will be adequately documented.

VisualSP and the content are sourced from SharePoint-Videos.com, a US-based company with phone and email support available to all customers.
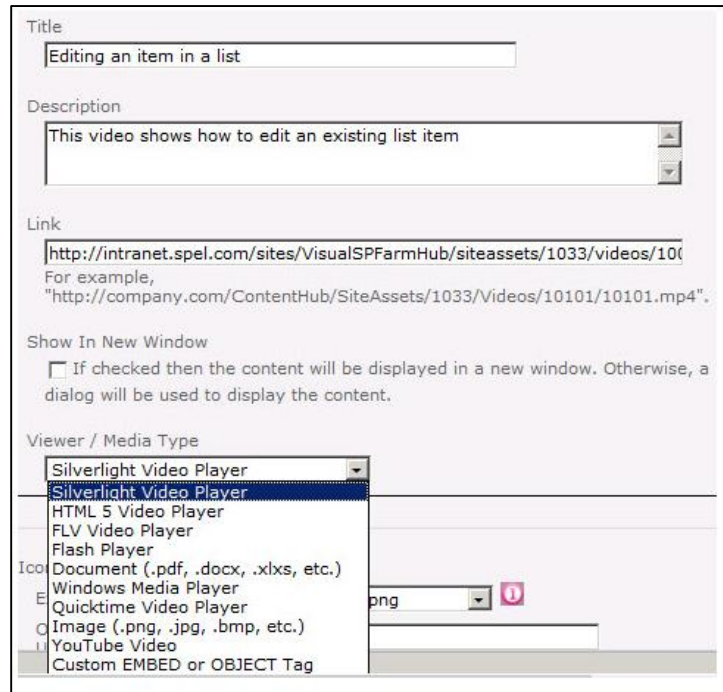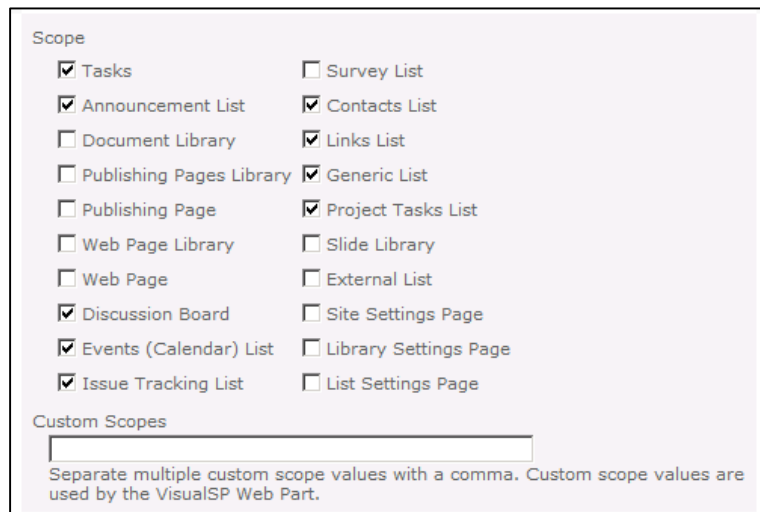

Figure 3: Available help context "scopes"

Benefits

Implementing VisualSP will:

- **Shorten the learning curve for SharePoint end users** – Reducing disruption of work, providing end users and their managers with quicker satisfaction with their SharePoint deployment, and increasing the users' motivation to learn and develop new SharePoint-based tools.
- **Improve the odds of successful adoption** – Users will more quickly recognize the utility of SharePoint. They will be more likely to share content, collaborate, maintain personal profiles and use the social functionality in SharePoint that makes it such an effective productivity tool.
- **Reduce errors** – Users supported by VisualSP will make fewer deployment mistakes, reducing frustration among their peers and lessening risks such as exposure of confidential data to users who should not have permission to see that material.
- **Faster ROI on the SharePoint investment** – Users will have greater confidence in their skills and will be likely to take on higher-value challenges, building more ambitious SharePoint solutions.
- **Reduce burden on the SharePoint Support team** – VisualSP will provide content that resolves issues that otherwise would result in higher volumes of help desk calls.

> **"VisualSP has proven an invaluable resource. Instead of having to wait for their questions to be answered, or for training to be offered at their location, our end users can access the information they need on the spot when they need. The ability to add our own content to the help system has made acclimating new users to our internal forms much easier. A picture truly is worth a thousand words, and a video is worth even more! VisualSP is the best add-on for SharePoint I've seen in the 7+ years I've been working with SharePoint."**
>
> **Robin L. Witcher**
> SharePoint Administrator and End-User Trainer
> West Georgia Technical College

How to get started with VisualSP

Adoption is simple, but like any project, it requires planning. Ideally, the first users should be identified in advance as suitable early adopters for your organization. Once the project is appropriately scoped:

- Identify resource(s) with administrator access to the farm(s) where early adopters' content will be housed.
- Get and install an evaluation copy. Guidance on the installation and orientation of the end users is available from SharePoint-Videos.com.

> **"Modine is happy to partner with SharePoint-Videos.com. We have been able to set SharePoint baseline knowledge in our organization for both business users and IT."**
>
> **David Webster**
> Manager – Web Applications
> Modine Manufacturing

- Obtain permanent product licenses for the farms serving the end users who need VisualSP.

Your organization has made a substantial initial investment in its SharePoint deployment. Achieving a return on that investment will depend on your team's success in using SharePoint to create value, by collaborating effectively and by using the platform to build content repositories and productivity tools. Some if not all of this effort will be expended by business users whose core competency is remote from software development. Onboard, in-context help through VisualSP can give those users the confidence to adopt SharePoint successfully and complete the journey to measurable ROI.

References

1. "You make the rules – but will your content play along?" (Peter Dorfman Creative Services – 2014 – http://dorfmanwords.com/2014/02/17/you-make-the-rules-but-will-your-content-play-along/)

2. "Enterprise Findability Without the Complexity" (Google White Paper, 2008. -- http://static.googleusercontent.com/media/www.google.com/en/us/enterprise/enterprise_solutions/pdf/findability-wp.pdf