SharePoint: A Librarian’s Most Versatile Tool

by Catherine Monte of Fox Rothschild LLP

SharePoint has been a focal point of the knowledge management department at Fox Rothschild since 2002. We started on the 2003 platform and implemented MOSS 2007 a few years later, enhancing the search function with custom XSLT data view Web parts. We also used a third-party tool (Handshake) and SharePoint Designer for custom workflows. In the beginning, we utilized SharePoint’s out-of-the-box ECM functionality to spearhead the creation of the firm’s intranet and to organize basic information such as the firm directory, the firm calendar and administrative resources, including accounting forms, HR/benefits information and policies.

It has evolved over the years to encompass custom solutions that include Teamsites for our own department, mini workflows for other administrative departments, collaboration platforms for legal practice groups and extranets for clients. On a firmwide level, it continues to serve as the primary communication vehicle for the firm, and the KM team continues to build upon its enhanced functionality. We are in the midst of rolling out version five to create greater efficiencies and integrate with firm data stores.

No matter how broad the experience or size of your team, you can learn to use SharePoint to create solutions for your firm or organization.

SharePoint Is Here to Stay

I don’t think anyone would dispute Microsoft’s current share in the ECM market and how ingrained SharePoint is becoming in law firms and legal departments. (For more information, see the “Tech Outlook: SharePoint Takes a Bigger Piece of the ECM Pie” article in Redmond Magazine.) With the introduction of the 2003 platform, Microsoft saw a fraction of law firms fully utilizing the technology. Increased adoption came with the 2007 platform and now with 2010 (and soon 2013) deployed, SharePoint has become an essential part of a firm’s information architecture, workflow and collaboration. A large percentage of the legal market is using the technology in one way or another.

According to the recent AIIM white paper “The SharePoint Puzzle — Adding the Missing Pieces”: “SharePoint has evolved from a somewhat lowly position to become the Swiss army knife of corporate IT departments, promising collaboration, team and project management, electronic content management (ECM), intranets and portals, records management, and more — straight out-of-the-box, and with over 70% of organizations having deployed SharePoint in some form, it appears to be here to stay.”

If SharePoint is a multipurpose tool that has the potential to solve many problems, and it seems to be entrenched in the fiber of law firms and legal departments, where do librarians fit into the picture? Are they harnessing this resource to improve their team efficiencies; are they creating content and sites for legal departments and practice groups?

Current Projects and Future Opportunities

SharePoint is gaining ground in libraries — specifically law firm libraries. According to Jackie Fishleigh, library and information...
manager at Payne Hicks Beach, this trend has already taken shape in the majority of law firm libraries in the United Kingdom: “In a recent Law Society library future trends survey, three out of four U.K. law firm respondents said they worked with SharePoint.”

A survey I conducted also pointed to this increase. (See survey results at the end of this article)

Why is this a growing trend? I believe there are several major reasons for the uptick over the last few years.

• SharePoint is a platform with an intuitive tech interface and hence provides a shorter ramp-up time in terms of learning.
  This “nondeveloper” or “no-code” interface allows library and other administrative staff to update content and create lists without the need for HTML skills or knowledge.

• As Lorette Weldon states in “SharePoint is Plug and Play for Librarians”: “SharePoint, once seen as a playground for code and project management strategy, started to become a ‘plug and play’ field for the novice who had social networking skills from MySpace, Facebook, LinkedIn, etc.”

• SharePoint incorporates Web 2.0 functionalities, such as blogs and wikis, which capitalize on skills librarians are already using in similar social networking tools.

• Librarians possess a vast knowledge of legal resources, search query protocols and innate categorization skills. These translate into a better analysis of database design and architecture and contribute greatly to robust solutions.

  According to Jackie Fishleigh in “SharePoint and the Naked Law Librarian,” other librarian skills that provide advantages include:

  • Communication Skills: Key when engaging practice group leaders on information to include and in training on new functionality

  • Specialist Knowledge: For better searching/utilization of technology tools

  • Influencing and Negotiation Skills: To encourage better buy-in and adoption for attorneys and staff

  • Organization of Information: For quality, accurate and current content (we do this every day!)

On the flip side, the challenges are deciding how best to solve your problem and design a solution. Because SharePoint is so flexible, configuration options are endless, and the sky is the limit. It is possible to get overwhelmed when starting out, so the best advice is to start with crafting a basic solution for a discreet and well-defined problem. Think along the lines of a SharePoint list for your collection development projects or a project task sheet for the team. As Lisa Ennis and Randy Tims describe in their June 2010 article “Harnessing the Power of SharePoint for Library Applications” for Information Today: “The product does so much and you can configure it in so many different ways that deciding the best route to take is daunting.”

If you need a nontechnical starting point, a concise and insightful overview of terms can be found in an April 2011 article for the Montague Institute by Jean Graef, where she includes 10 things librarians need to know to help their organization increase the return on their SharePoint investment. If you want a bit more technical detail, reference the March 2012 Information Today “Help Central” article by Ennis and Tims. And if you are really adventurous, just jump in and get your hands dirty as we did at Fox Rothschild (with some training from MindSharp).

SharePoint at Fox Rothschild

When SharePoint first started gaining ground in law firms, Fox Rothschild decided to experiment with it and created the firm’s intranet, FoxNet, in 2002. At that time it was a collaborative effort.
between several administrative departments. Shortly after the first upgrade in 2003, the KM group took full ownership of both content and architecture. We were being asked to produce more targeted solutions for attorneys that capitalized on internal expertise, such as brief banks and standardized forms. KM was also tapped to see how content could be shared across offices and how information could be pooled together into directories for attorneys and experts. This evolved into our outside counsel and expert databases.

At the time, Fox Rothschild was experiencing rapid growth with the addition of three West Coast offices, and it was deemed critical to be able to capture and share this type of information firmwide. The firm was also expanding into niche practice areas, and the KM group began drafting a standardized legal skills taxonomy to better facilitate how colleagues could support each other internally and also how we could more efficiently serve our clients. An attorney skills profile database was developed to capture legal and other expertise (e.g., bar admissions) and to provide functionality for searching across offices and specialty areas.

It was also at this time that I foresaw the need for additional staff to support this function. We had a managerial-level technical librarian who oversaw the intranet and other KM technology projects (such as West km) as well as a Web designer. However, we also needed a dedicated KM developer to support our custom coding projects. Over the next few years, the team expanded to include a knowledge services team of six, consisting of a director, a Web designer/developer, a junior Web developer, an application developer, a KM systems administrator and a data steward. This team works closely with the other teams under the KM umbrella: research services, acquisitions/collection development, research/KM training, competitive intelligence, and risk mitigation.

Various administrative departments and legal practice groups also continued to build upon their respective pages, and these groups gradually contributed additional content and resources. Since KM research staff regularly attend practice group meetings, we were able to better understand the groups’ needs and became more comfortable and adept at suggesting solutions.

This forum continues to be a good opportunity for us to provide informal intranet training and for soliciting feedback on future projects and functionality. Over the years, we have become not only the go-to specialists for content and research but also the go-to staff for architecting more efficient ways to communicate and share resources.

**FOXNET: ATTORNEY SKILLS PROFILE EXAMPLE**

**Practice Details:**

Named as one of the leading litigation attorneys in Pennsylvania

- antitrust
- securities

**KM Department**

The KM department also uses SharePoint to streamline our daily work processes. First and foremost, the team needed a centralized place to note and track research projects and task assignments for each staff member. We also needed a complete strategic view across the teams within the department. We decided to create a management-level SharePoint site to house this general view using SharePoint’s out-of-the-box list functionality, and we included HR reports, policies and other documentation on the site using SharePoint Designer architecture for customized Web parts. Individual sites were set up for each section of the department: research, acquisitions, competitive intelligence, risk mitigation and knowledge solutions. We also set up sites for cross-team collaboration engagements, such as collection development, training and monitoring, as well as for specific ongoing projects, such as West km and Research Monitor. With these sites, all staff can receive task assignments that are auto-generated from the SharePoint lists.
Staff members can also share documents, resources and lessons learned on this platform. This setup allows for multiple-user access, enhanced efficiency and all-around increased productivity of staff. Where we integrated project lists, we also included fields such as office, department and project type so that better standardized statistics could be compiled for annual and practice-specific reports. Previously, we had relied heavily on Outlook with color-coded email messages and Excel spreadsheets with multiple columns to track the number and type of projects, which resulted in a manual compilation of our department statistics. Now we have a much easier interface to use and more options in terms of views and output. I can also view staff workloads and the status of pending tasks more easily.

Another advantage is that I am able to use the master department list to set the agenda for my weekly directors meeting and in preparation for my monthly update with our firm COO and managing partner. I must confess that initially I was very skeptical about converting to this system; however, I became comfortable with the interface and saw the payoff almost immediately. It certainly makes me more efficient!

**Cross-Department Collaboration**

Once the KM staff became comfortable with the idea of Teamsites and understood the functionality better, we began promoting the concept among our administrative colleagues. We set up a senior administrative project registry and created a Teamsite for the chief-level administrators in the firm. This was our initial foray into a “more than casual, but not too structured” version of project management for the firm.

**KM TEAM STATISTICAL REPORT EXAMPLES**

**BILLABLE HOURS BY OFFICE**

In addition to strategic projects, we share firm financial reports, competitor benchmark statistics, HR surveys, etc. We rely on the alerts feature heavily, which provides updates to any new content added to the site.
We can also create dynamic views by department, project status, project tier, etc.

**TEAMSITE: SENIOR ADMINISTRATION ENTERPRISE PROJECT REGISTRY**

**Extranets: External Communication and Collaboration**

We also began to support external sites for lateral recruitment and client teams. We had inherited a few 2003 client extranet sites and began to create new sites in the 2007 platform. In addition, our professional recruitment and development department approached us to discuss options for creating a recruitment application workflow for new laterals. We published a lateral partner extranet site in 2010 and began building associate and paralegal sites using custom code soon after. We were also tasked with building a toolkit for our corporate department chair to support emerging companies needing basic start-up documentation. We continue to support this department’s efforts in other extranet initiatives and have expanded into support for litigation and intellectual property.

**Future Projects at Fox Rothschild**

We currently are in the process of upgrading to the 2010 SharePoint platform for both our intranet and extranets with an eye to explore the 2013 platform in Q1 of next year. With assistance from a consultant, we are also redesigning our homepage, analyzing navigation/architecture and exploring enterprise search, which we plan to integrate into FoxNet fully. As part of this process, we are conducting usability studies with attorneys and staff, information which will aid in forming working groups. One request from users we hope to implement is a greater degree of customization using MySites, along with Web 2.0 or 3.0 functionality.

We are also analyzing our mobile story and weighing whether it is feasible to use SharePoint 2013 as a backend for our external website. Within the KM department, we are exploring wiki functionality to house our department procedures manual and are experimenting with a blog to publish news content and analyses to senior administration. Our ultimate goal is to respond to business needs with more agility.

**Your Future with SharePoint**

There are a number of ways a librarian/information professional can utilize SharePoint technology to support the business and practice needs of an organization. Below are tips for getting started and several suggestions for potential initiatives based on “The SharePoint Puzzle — Adding the Missing Pieces.” As SharePoint is here to stay, why not make use of it? You might discover new possibilities and your inner techie!

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Catherine Monte manages knowledge management research and competitive intelligence initiatives at Fox Rothschild LLP. She serves as the project lead for the firm’s intranet and is now focusing on practice and risk management, portal development and taxonomy integration. Previously, Catherine worked as the head of information services at Clifford Chance. She is a member of the American Library Association, AALL, SLA, LLSDC, ILTA, GPLLA and the Society of Knowledge Based Publishers. Catherine can be contacted at cmonte@foxrothschild.com.
### ADDITIONAL RESOURCES

#### AVAILABLE TRAINING/CONFERENCES

- **AIIM Conference:**
  [www.aiimconference.com](http://www.aiimconference.com)
- **Critical Path Training:**
  [www.criticalpathtraining.com](http://www.criticalpathtraining.com)
- **ILTA Annual Conference:**
  [http://conference.iltanet.org](http://conference.iltanet.org)
- **ILTA Annual SharePoint Symposium:**
  [http://sharepoint.iltanet.org](http://sharepoint.iltanet.org)
- **J. Boye Conference:**
- **MindSharp:**
  [www.mindsharp.com](http://www.mindsharp.com)

#### TECHNICAL RESOURCES

- **NothingButSharepoint:** Well-known developer-to-developer resources on the Web.
  [www.nothingbutsharepoint.com](http://www.nothingbutsharepoint.com)
- **Microsoft SharePoint Website:**
  Introductory information and links to resources for additional learning.
  [http://sharepoint.microsoft.com](http://sharepoint.microsoft.com)
- **Microsoft TechNet Library:** A helpful SharePoint Products section.
  [http://lccn.loc.gov/2010932458](http://lccn.loc.gov/2010932458)
- **SharePoint 2013 Demos:** Microsoft-provided demos.
- **SharePoint in the Cloud = Office 365:** Information about SharePoint in the cloud.
- **SharePoint-Videos.com:** Created and maintained by one of the leaders in “No-Code” development. Both free and subscription-based content.
  [www.sharepoint-videos.com](http://www.sharepoint-videos.com)

#### PROFESSIONAL ORGANIZATIONS

- **AALL:** [www.aallnet.org](http://www.aallnet.org)
- **ILTA:** [www.iltanet.org](http://www.iltanet.org)
- **ABA:** [http://www.americanbar.org](http://www.americanbar.org)
- **ALA:** [www.alanet.org](http://www.alanet.org)
- **BIALL:** [www.biall.org.uk](http://www.biall.org.uk)
- **CALL:** [www.callacbd.ca](http://www.callacbd.ca)
- **LLRX:** [www.llrx.com](http://www.llrx.com)
- **Montague Institute:** [www.montague.com](http://www.montague.com)
- **SLA:** [www.sla.org](http://www.sla.org)
TIPS

- Explore ways to capitalize on SharePoint technology to ensure the firm’s investment is utilized to its fullest potential.

- Identify the business reasons for wanting to deploy a solution in SharePoint.

- Plan your deployment carefully. Discuss it with IT, end users and business owners.

- Engage users throughout the process.

- Identify any internal systems or external repositories you might need to integrate to make information available.

- If required, call in expert consultants to identify suitable third-party add-ons to complement your existing solution.

SHAREPOINT AND LAW LIBRARIANS: SURVEY RESULTS

This survey was conducted by Catherine Monte. Over 85 firms/organizations participated in the survey from both the United States and Canada.

Does your firm currently use SharePoint?

<table>
<thead>
<tr>
<th>YES</th>
<th>86%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>14%</td>
</tr>
</tbody>
</table>

60% of respondents have 250 or more attorneys, so there is definitely a correlation in terms of firm size.

How large is your organization? (by number of attorneys)

| <101 | 13% |
| 101-250 | 26% |
| 251-500 | 28% |
| 501-750 | 12% |
| 750+ | 21% |

POTENTIAL INITIATIVES

- List for research projects
- List of collection development projects
- List of interlibrary loans
- List to monitor cases, news, legislation, etc.
- Teamsite for initiatives that cross administrative departments
- Teamsite documentation of large projects
- Wiki for department procedure manual
- Blog for breaking news alerts
Most respondents, 70%, reside in the library, with 13% in KM and fewer numbers in other administrative departments.

Which department do you work in?

QUALITATIVE RESPONSES:

- Both the library and KM are under me.
- Our department is called Information Services and is made up of the library and litigation support.
- Our Practice and Client Solutions group includes KM, LPM, Intranet/Extranet, etc.
- The library (research services) is part of IT.
- I am the Information Manager and Librarian.

TECH FINDINGS

Approximately 85% of respondents are using SharePoint in some form. The 2010 platform is used primarily, but 2003 is still being used as well. 72% are in the process of migrating from 2003/2007 to 2010. In terms of experience with the tool, 50% have been using the 2007 platform for 3-5 years, but a fair amount of respondents used 2003 as well. This experience is more extensive than I thought it would be. 5% of respondents report that they have also been dabbling in 2013 beta the last few months.
SURPRISING ROLES

When designing the survey, I wanted to capture not only the tasks performed by librarians, but also the roles librarians held in SharePoint-related projects. The breakdown of roles was in two broad categories: Reader/Contributor and Owner/Designer. I listed tasks related to the projects and then further divided those tasks into the world of intranets, extranets and public websites. I was very surprised to discover how active many librarians already are in contributing to these initiatives — most notably, intranets. Here are the highlights:

Please check off the intranet areas in which you work (multiple responses allowed):

Please check off the extranet areas in which you work (multiple responses allowed):

RESPONDENT HIGHLIGHTS:

Intranets
- Lists/Libraries and Page Editing: 50% are the Owner/Designer; 25% the Reader
- Publishing Sites: 30% are the Owner/Designer
- Teamsites: 30%
- Customer Solutions: 15%
- Committee Member: 15%
- Complete Ownership of Farm: 10%

Extranets
- Lists/Libraries: 20%
- Page Editing: 15%
- Publishing Sites: 15% Owner/Designer
- Teamsites: 14%
- Customer Solutions: 8%
- Committee Member: 10%
- Complete Ownership of Farm: 8%

Public Websites
- 10% currently use SharePoint
- 8% are considering using SharePoint
LOOKING AHEAD

Many comments were included on how firms/organizations are considering SharePoint technology for future projects. Some commented on workflow solutions. Others remarked how much blogs and wikis were making Web 2.0 more mainstream and integrated with the firm. A few expressed some frustration on not having access to the tool. Here are selected highlights:

General:
• For case management, SharePoint is a good platform.
• We’re looking to implement more internal workflow solutions to improve processes, specifically for admins (new employees, technology requests, videoconference requests, etc.).
• We are close to deploying FAST for Enterprise Search. We use K2 Blackpearl for custom workflows. We are constantly seeking new ways to leverage SharePoint as a tool.

Web 2.0:
• We have installed SharePoint 2010 and are experimenting with blogs and wikis to see how we would like to utilize the technology. We plan to make this a full project for 2013.
• We are developing practice group pages, pushing CI content out to attorneys and turning My Page into a “Communities” page.

Cons:
• IT tightly controls access to SharePoint and does not allow other departments to make their own changes. They do make changes we request.
• We use SharePoint on a limited basis for client extranets, but KM/library is not involved.
• As the director of library services, I have little to do with SharePoint. I am simply a user/reader.

OPPORTUNITIES

Perhaps my parting thoughts can echo Professor Richard Susskind when he spoke at the AALL conference this past July. As usual, he touched on change within the legal market and challenged the way firms typically approach client work. However, he espoused the view that law librarians are an integral part of their organizations and that they should continue to build upon and evolve their innate research and technology skills. Be an agent for change and challenge yourself to think beyond your current skill set. Entertain the thought of being a “legal knowledge engineer,” “legal technologist,” “legal process analyst” or “legal project manager.” One of the ways to embrace these opportunities is to utilize a tool already a part of your firm/organization arsenal — Microsoft SharePoint.

This article was first published in AALL/ILTA’s October 2012 white paper titled “The New Librarian” and is reprinted here with permission. For more information about AALL, visit their website at www.aallnet.org. For more information about ILTA, visit their website at www.iltanet.org.