

# SharePoint as a Documentation Tool; Life Beyond the “Big Honkin’ Binder”

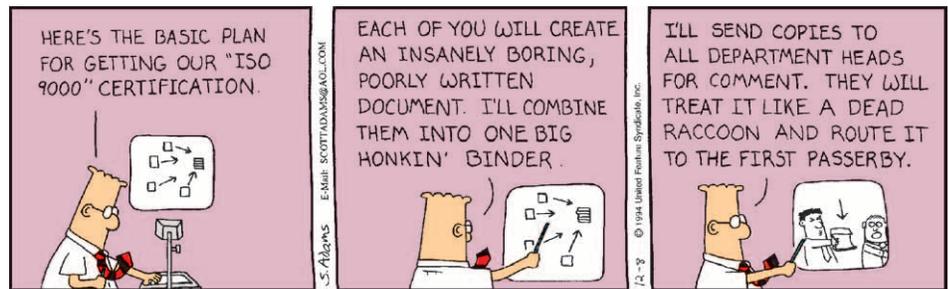
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## Abstract

Procedure writing often results in the “Big Honkin Binder” that is not read, referenced or revised. Microsoft SharePoint offers an alternative medium to create procedures through its wiki functionality. Alberta’s Ministry of Advanced Education, has developed a wiki-based eProcedure Manual that documents how IT contract resources are engaged by using ‘out-of-the-box’ Microsoft SharePoint technologies. As a result, contract managers have access to online procedures that include process flow graphics, detailed steps, a database of frequently asked questions and more detailed guidelines for specific activities. Access to the eProcedures can be scaled from read only to full contribution in addition to a full audit trail of all changes made. The eProcedure methodology can be applied to most business applications. An online side bar discusses Stephen Page’s “18 Decisions to Make Before Starting to Write a Procedure” and another discusses the impact that John (Jack) M. Carroll’s work has had on instruction manuals through the concept of communication Minimalism.

## The Problem of the “Big Honkin’ Binder”

Some organizations have mastered the art of documentation by applying discipline and technology to record their procedures. Other organizations coast on their ‘oral traditions’ to write procedures with perhaps some dusty binders as evidence of past efforts. If you are the later, how many “Big Honkin’ Binders” do you have? When was the last time you opened it let alone updated it? How can a SharePoint eProcedure help?



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Figure 1: Dilbert (1994-12-08) and the “Big Honkin’ Binder”.

## What is SharePoint and How to Start?

Microsoft states that ‘organizations use SharePoint to create websites; a secure place to store, organize, share, and access information from almost any device.’<sup>1</sup>. Most people know SharePoint as a place to upload documents, but it can do much more such as create eProcedures.

If you are an experienced SharePoint user, you can jump right in with the elements discussed below. If not, you will need some basic knowledge and training.

Once you have the basics, you can then utilize the eProcedure methodology that Alberta’s Ministry of Advanced Education (AE) adopted to document the recruitment of IT contractors. The AE experience is presented below as a case study complete with samples. Because AE is responsible for the province’s adult learning, the eProcedure discussion starts with SharePoint 101 and then works its way up to SharePoint 401. Your SharePoint eProcedure education is summarized as follows:

Course	Prerequisites	Summary
101 – THE WIKI	<ul style="list-style-type: none"> <li>SharePoint 2010 or more recent version.</li> <li>Knowledge of libraries.</li> <li>Sufficient access privileges.</li> <li>Wiki functionality.</li> </ul>	Using templates to create standard pages for: <ul style="list-style-type: none"> <li>how-to do things;</li> <li>how were things done; and,</li> <li>what infrastructure was used to do the activities.</li> </ul>
201 – IMAGES	<ul style="list-style-type: none"> <li>SharePoint 101.</li> <li>An image library.</li> <li>Comfort using basic computer graphics including inserting into pages.</li> </ul>	Improve eProcedure pages by inserting graphics including procedure flow charts.
301 - FAQ LIBRARY	<ul style="list-style-type: none"> <li>SharePoint 201.</li> <li>Comfort creating or managing lists.</li> <li>Knowledge of lookup columns in lists.</li> <li>Knowledge of inserting web parts.</li> </ul>	How to create a SharePoint list of common questions (the FAQ). Embed the list into a wiki page using views. Manage views through the use of lookup columns.
401 - SECURITY	<ul style="list-style-type: none"> <li>SharePoint 301.</li> <li>Understanding of SharePoint security and access management.</li> </ul>	How to protect your site while encouraging contributions from readers/users.

<sup>1</sup> Adapted from: <https://support.office.com/en-us/article/What-is-SharePoint-97b915e6-651b-43b2-827d-fb25777f446f>, accessed 2016-08-09.

## SharePoint 101 – The Wiki

### Prerequisites, you have...

- SharePoint 2010 (or a more recent version if available to you).
- An understanding of the concepts of libraries and administrator privileges to create a wiki library on your site (or engage an administrator who can do this for you).
- Familiarity with creating wikilinks between pages using the [[page]] functionality.

At the heart of the SharePoint eProcedure is the wiki library. The following image shows the first page of AE's IT contracting site; the Seven Step Contracting process. Clicking on any one of the boxes will lead to the detailed eProcedure wiki page.

This graphic is just like a table of contents in a binder but better because of the linking and cross-referencing available in a wiki. Before you start creating these detailed procedures, it is important to learn about what type of pages to create (standards) and how to

create consistent pages that have similar look and feel (templates).

### Page Standards and Templates

Without standards, it is easy to create hundreds of pages of content that is no better than the "Big Honkin' Binder". When you create a new wiki page you are giving it a name that will show up in the address line, for example: [\IT-Contracting\Procedure\How-to-IT-NeedIdentification.aspx](#).

One of the powerful features of a wiki library is this linking functionality. Reserve the first few characters of your page name for a consistent standard, it is easier to find a page when creating new content. The standards AE uses are:

- **"How-To"**-[SUBJECT NAME]:  
Are used to describe procedures or guidelines.
- **"Wisdom"**-[SUBJECT NAME]:  
Describes one *PAST* event.
- **"Infra"**-[SUBJECT NAME]:  
Describes a piece of infrastructure such as a SharePoint List.
- **"File"**-[FILE NAME]:  
Defines a file, report, etc.

- **"Template"**-[SUBJECT NAME]:  
Used as a starting point for a new page.

### How-To and Wisdom Pages

**How-To** pages describe how to do a particular function. For AE, how-to pages come in two varieties. **Procedures** describe the process; who does what, when they do it, and under what criteria. **Guidelines** are general statements, recommendations, or administrative instructions. As they are not mandatory, "guidelines" and "best practices" are interchangeable.

**Wisdom** pages are 'how-did' pages describing how one unique event was carried out. A wisdom page keeps historical event information out of your procedures and are a form of corporate memory for future reference.

### Infra, File and Template Pages

**Infra** and **File** pages describe infrastructure and files. One of the challenges of managing a business process is how do you describe the tools used? An infra page may describe a SharePoint list

## ITM Procurement Procedures Overview - Desk Reference Site

### Procurement Process Overview

This graphic is an overview of the procurement process from the identification of a need to the termination/exit of the resource.

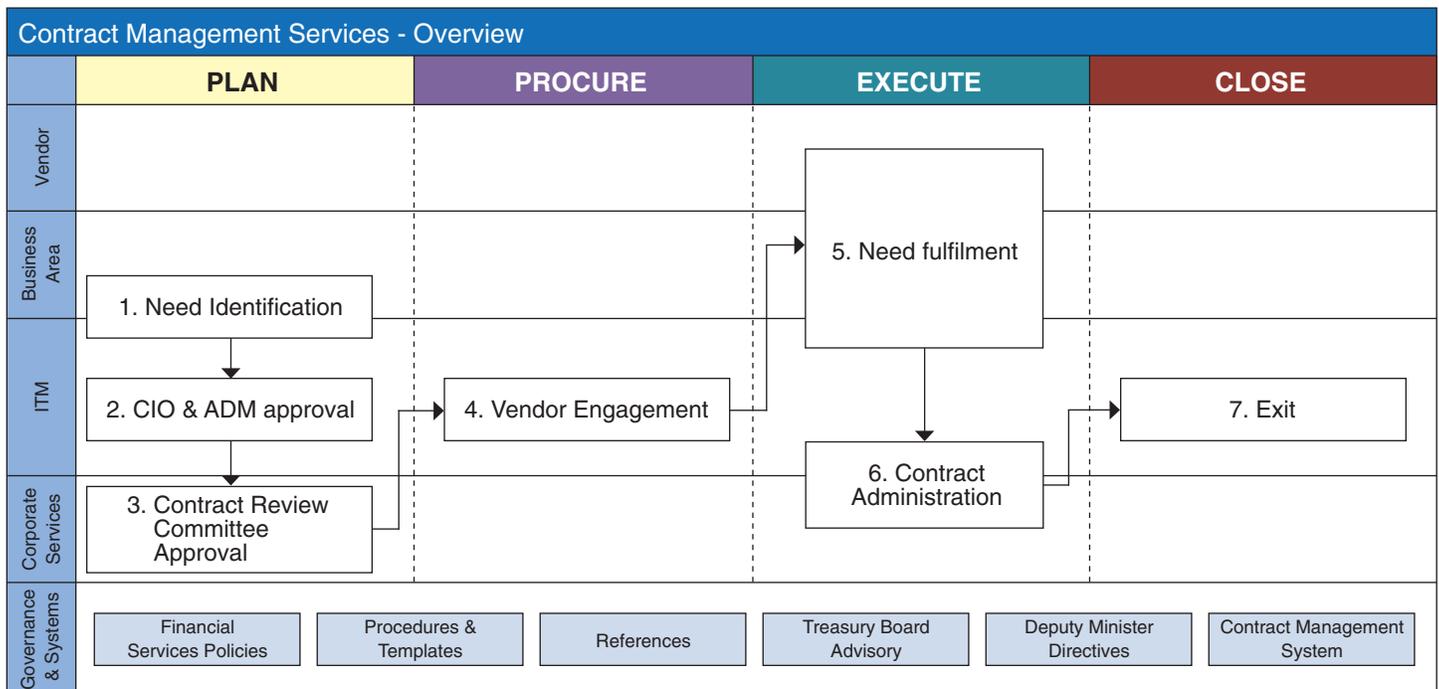


Figure 2: Seven Step contracting process AE ITM – Splash Screen

or the look and feel of a process flow diagram. File pages describe a document such as Excel.

**Template** pages keep the same look and feel across the eProcedure by being the starting point when creating new pages. For example, AE has a standard 'template-HowTo', 'template-Guidance', 'template-Infra', etc.

**Tips and Tricks**

- Avoid spaces in page names, use “-” or “\_” instead (a “SPACE” appears as “%20” in the URL).
- 12 point font is the best compromise between online and printed text size.
- Start with fewer pages built from standards and then add more as required.
- By using hints and summaries, try to keep your pages to about 2 pages printed (see “Side Bar: *Where Have All the Instruction Manuals Gone?*” for more on less).
- **Bonus Marks:** Add the following custom columns to your wiki library: ‘Accountable’ (who owns this page and keeps it current) and ‘Review By’ (when is a mandatory review scheduled for the page). These columns can be used to keep your eProcedure fresh and relevant.

**SharePoint 201 – Images**

**Prerequisites, you have...**

- Comfort building wiki pages (SharePoint 101).
- An image library to manage images on the site.
- Knowledge of how to insert an image into a page.
- Very basic image management skills such as capturing screen shots, using a graphic editing tool (e.g. Visio) and basic graphic editing such as re-sizing or cropping an image.
- Basic flow charting knowledge.

1. The **Side Bar: *Where Have All the Instruction Manuals Gone?*** discusses the concept of Minimalism and how images can help the user learn more from an eProcedure by reading fewer words. Images include process maps, screen shots, etc. For process flows, select a standard format and stick

with it. Document the look and feel of your ‘process-flows’ in an infra wiki page. Create a dedicated image library for the graphics which will make it is easier to find and update the images. Turn on version history in the library and do not change the file name as this will break the link to the image.

2. Ideally the process flows should follow a hierarchy such as the Seven Step contracting model. Each of the seven steps has more detailed process flow diagrams, but they are all tied to the overarching model. Thus under Step 1.0 Need Identification; there are subordinate steps such as “1.1 *Identify Contracts Expiring and Requiring Renewal*”.

**Tips and Tricks**

- The PNG format displays best on the screen and in print, however PNG images are larger and will take longer to upload.
- You can use graphic software, but Microsoft Visio and Paint are the most versatile.
- Microsoft Visio is the champion of developing process documents.
- Resize images to a maximum of 1000 pixels wide so they don’t truncate when printed.
- **Bonus Marks:** Place a ‘version date: yyyy-mm-dd’ discreetly at the bottom of all images and update to the current date each time the image changes.

**SharePoint 301 - The FAQ Library, Lookups and Views**

**Prerequisites, you have...**

- Basic knowledge of creating wiki pages (SharePoint 101 and 201).

- A Frequently Asked Question (FAQ) Library or the ability to create a library or custom list.
- An understanding of the SharePoint lookup column. A lookup creates a relationship between two or more SharePoint lists and libraries.
- Understanding and the ability to create public views for SharePoint lists.
- Knowledge of how to insert a web part into a page (e.g. inserting a list into a library).

By just developing a wiki library, you would have an impressive resource to put the “Big Honkin’ Binder” to shame. Embedding dynamic information into an eProcedure page, such as a list of FAQs, is what differentiates an eProcedure from a paper-based binder. The FAQ Library provides additional context and detail without having questions interrupting the writing flow. While the FAQ list can be separate from the wiki, it is more powerful to integrate it into a wiki page via the web part function. In one place, the reader can then see both general procedures and specific questions, and answers to problems.

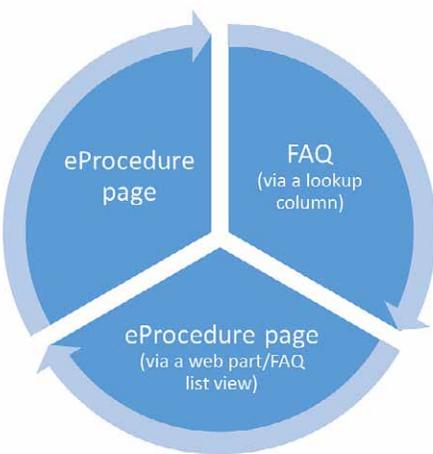
Each question should address one element of the procedure and phrased in such a manner that it has a ‘Yes’ or ‘No’ answer. Break larger questions into smaller ones as required. The FAQ can be a custom list or an announcement library. The following is a fictional example of one question in AE’s FAQ Library dealing with sole sourcing a contract:

In the example below, a lookup column with the SharePoint page name is inserted into the FAQ list. Thus all questions associated with the first step of the procurement process

<b>Subject</b>	Contract Approval - Can we sole source contracts?
<b>Body</b>	<p><b>Q.</b> Can we still source contracts and if so, what is the process?</p> <p><b>A.</b> Yes, but under very strict conditions. The Deputy Minister must approve all sole source contracts over \$10,000. They are reported under our trade agreement obligations and there is a defined set of reasons to sole source. Engage Finance and Procurement if you think you have a sole source requirement. They can assist you in defining the need, validating the requirement, receiving the appropriate approvals and reporting the sole source contract.</p>
<b>eProcedure Page</b>	How-to-1NeedIdentification
<b>Status</b>	5.Approved
<b>Expires?</b>	2099-12-31

can be identified as pertaining to that procedure. A separate SharePoint-view can be created that filters this column. Because you have a dedicated view with all the questions associated with ONE wiki page, these FAQs can be inserted into that page as a web part.

The adjacent diagram demonstrates this circular (but powerful) function. The course-tutor (aka your SharePoint administrator) can help with this. Also use this crib note to understand the circular relationship: eProcedure page ⇒ FAQ (via a Lookup Column) ⇒ eProcedure page (via a Webpart/FAQ list view).



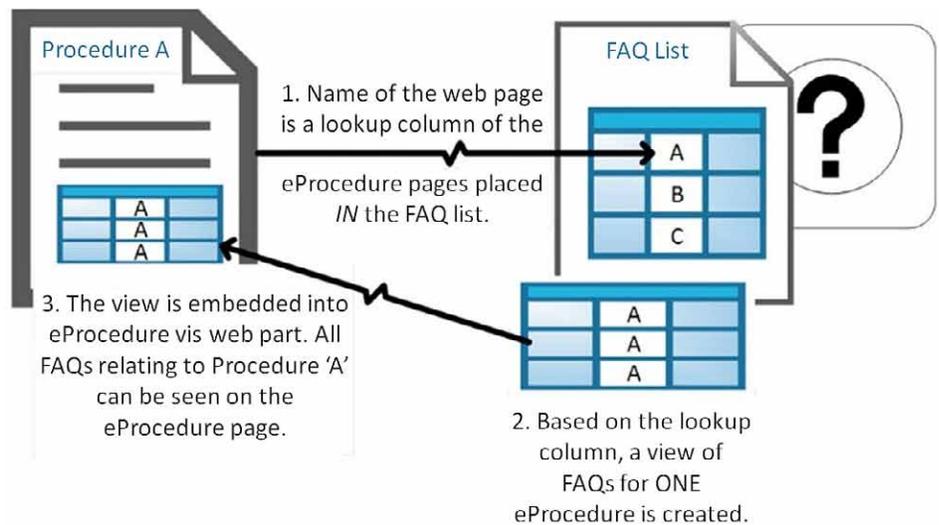
**Tips and Tricks**

- Preface each FAQ with a business process label. This helps the reader sort and scan a long list of questions in a list. For example: ‘Contract Approval’ – [Question].
- Use the questions as part of ongoing training.
- Each question should automatically expire requiring a conscious effort to renew all questions periodically.
- **Bonus Marks:** Add other columns to the FAQ Library such as ‘Status/Review by’ or ‘Accountable’ (the person responsible to keep the question current and accurate).

**SharePoint 401 - Securing the Site and Upgrades**

*Prerequisites, you have...*

- A good system administrator or the skills to manage permissions, etc.
- An Infrastructure eProcedure to document how to secure your site.



SharePoint has good out-of-the-box security to control access to sites, lists/libraries or items. In addition, alerts can be created to monitor for changes. Nevertheless, few people will ever contribute or change your site. Apathy is a much deadlier foe for your eProcedure than vandalism or misguided updates. Another foe for SharePoint are upgrades. Fortunately, everything described in this article is standard SharePoint functionality.

**Tips and Tricks**

- Turn on version history on your lists and libraries.
- Use alerts to email you when someone has made a change to an eProcedure, changed/added a question to an FAQ Library or uploaded a new document to a library.
- Encourage users to correct minor errors (e.g. spelling, grammar or clarity).
- Periodically (e.g. once a year) print everything to PDF to provide a point-in-time archive.
- **Bonus Marks:** Provide incentives for those who have contributed such as a monthly coffee card or lunch with the boss (... unless this is a disincentive).

**The Life and After Life of an eProcedure**

Technology for developing procedures will not gain senior management support or prevent rogue employees from ignoring them. However, technology,

such as a SharePoint, can help your organization create something better than the “Big Honkin’ Binder”.

The wiki page allows for multiple people to edit an eProcedure, record each of these changes and have a single source of procedure truth. An image library allows you to update an image once and all pages are automatically updated immediately because they link to the library. The FAQ Library provides a dynamic way to deal with specific issues without bogging down your procedures. Finally, alerts, access and security protect your documentation efforts while helping to keep the eProcedures current and relevant.

Ideally, procedures should be seen as an asset that can be leveraged and reused. Incorporate the procedure in the orientation of new employees, periodic staff certifications or even amusing exercises during meetings.

If you would like to learn more, visit [www.myorgbio.org](http://www.myorgbio.org). Templates and other materials discussed in this article are available to download. For their support and permission to share this content, a grateful gratitude is extended to AE.

*Alberta* ■ Advanced Education

**Side Bar: 18 Decisions to Make Before Starting to Write**

How to write a procedure manual is beyond the scope of this article. Such writing is a hard and thankless task but resources are available to help you.

One such resource is Stephen B. Page ([www.companymanuals.com](http://www.companymanuals.com)) who has a series of books on the topic. Page recommends making the following 18 decisions before starting to write. Certainly if you have at least a partial answer to most of these questions your procedure manual (in SharePoint or not) has a much higher chance of success.

Stephen B. Page's *18 Decisions to Make Before Writing the First Word!*

- What is your justification for writing policies and procedures?
- Who is the sponsor or manager that endorses/supports your role as a policies and procedures writer?
- Who manages the policies and procedures department in your company?
- Who writes policies and procedures and why?
- Will you have printed manuals and/or online network manuals, or both?
- Will there be a separate policy manual and a separate procedure manual?
- What is your numbering system for your policy and procedure documents?
- Where will the content come from? Who will decide how to research policies and procedures topics?
- What is the writing format for your policies and procedures?
- Are forms included, or referenced from, in your policies and procedures?
- Who reviews the policies and procedures?
- Who approves the policies and procedures?
- Who distributes the policies and procedures?
- Who communicates the published policies and procedures?
- Who trains the published policies and procedures?
- Who audits the published policies and procedures?
- Who monitors the published policies and procedures to ensure they are reasonably up-to-date?
- Who recommends improvements to current policies and procedures?

Source: [www.companymanuals.com](http://www.companymanuals.com), used with permission. All rights reserved.



Figure 3: The Evolution of the Manual. Courtesy of Popular Science and Anderson Newton Design. Used with Permission, all rights reserved.

### Side Bar: Where Have All the Instruction Manuals Gone?

When you last bought an electronic device did you notice something was missing, the instruction manual? Sure, there was as ‘get started’ guide in about 15 languages but probably not an instruction booklet. What happened to them?

Ask John (Jack) M. Carroll who has influenced packaging through his work evaluating computer manuals. In an email interview, Carroll says: “The basic idea of minimalist information is that people cannot effectively use comprehensive manuals; they make all sorts of errors. But people are outstanding at taking hints and reasoning. Once you have that insight, the design of information is a totally different challenge!”

For more on this (and its dark side), read the February 2015 edition of Popular Science: “Instructions Not Included; What does the disappearance of the common manual say about us?”. Author Mark Svenvold writes: ‘Writing a manual from a minimalist point of view harnesses the reader’s active engagement. Short, succinct manuals allow the user to quickly gain a sense of control and autonomy that inspires further learning.’ By extension, a minimalist procedure is the exact opposite of the “Big Honkin’ Binder”.

So how does Minimalism impact a SharePoint wiki? The wiki is highly searchable, a key element of Minimalism. In addition, an FAQ database separates the detail from the procedure. Jack Carroll may have taken your stereo manual – but his ideas can also help you write a better procedure. Adapted from: <http://www.andersonnewtondesign.com/work/popular-science-manual>; all rights reserved, accessed 2016-08-31. Alternatively read: [Minimalism Beyond the Nuremberg Funnel](#), 2003, edited by John M. Carroll.

### About the Author

Frank Potter is a professional accountant (CMA) and holds a MBA from the University of Athabasca. He is currently with the Ministry of Alberta Advanced Education and is the Director of Strategic Planning for Information Management and Technology. Previously he held roles, typically at the Director level, within governmental and consulting organizations. To contact Frank, visit [www.myorgbio.org](http://www.myorgbio.org) or email [frank@myorgbio.org](mailto:frank@myorgbio.org)

