

# **Marshall University: Using Microsoft SharePoint for Preparing an Institutional Self-Study**

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## **Introduction:**

Universities need collaboration technologies that use web applications, universal productivity tools, and secure portals to improve communication and information sharing. Marshall University sought to leverage technology to integrate our campus-wide planning with our NCA Self-Study process. Traditionally, the accreditation Self-Study effort has required that institutions pause while documenting the processes leading up to the present. Rooms full of filing cabinets and binders with data and papers documenting decisions, plans, results, and the process itself were gathered to prove that sound decisions were being made based on a cycle of inquiry. The key question is not what you did, but what you are doing, how, why, and most importantly, how do you continually monitor desired outcomes. To facilitate this approach, we have leveraged the functionality in the Microsoft SharePoint for our various planning divisions into our cycle of inquiry—vision, data collection, programs, environmental scans, and probing questions. At Marshall University, we engaged in a pilot study of Microsoft Windows SharePoint 2003 Portal and Services to meet these growing informational needs of our institutional, as well as for our upcoming NCA Self-Study. We wanted a product that would allow us full utility in capturing our unique history, culture, mission, and set of assets that shape our institutional planning and transformations. We think the lessons learned have wide applicability.

## **Background:**

Higher education, in West Virginia and nationally, is undergoing a period of tremendous change. Dramatic new technologies, limited state resources, increasing needs and demands for access, institutional mergers, and administrative turnover all impact the need to maintain quality documentation. This is coupled with a strong demand for accountability and collaboration. Preparing for a self-study requires the ability to collect, store and share critical institutional documents, and to actually empower all the constituents in the review process. Many institutions have environmental scans and sensitive documents that span the decade review period. Some documents are only shared at the highest executive level of administrators and are not normally distributed beyond key staff members. We needed a product that would allow for internal document security and authentication. Institutional mergers have also expanded the institution to include regional campuses that are many miles away from the home campus. All constituencies need to be included in the self-study process. The SharePoint approach helps limit the liability of concentrating knowledge in one person and minimizes the effects of attrition. It also allows the institution to leverage existing backup strategies and security safeguards while allowing Web access to documents anytime, anywhere.

As institutions move towards transformational changes that emerge from institutional vision, mission, and culture shared institutional understandings of how learning occurs best must be documented and reviewed. Relationships among learning, teaching, course and program development, application of technology, and institutional and community organization all influence our academic outcomes. Data-driven decision-making can be enabled by the intelligent and appropriate use of technology.

### **The Power of Sharing:**

The Internet has revolutionized the way people collaborate and communicate. This is coupled with the utilization of a large deployment of Microsoft productivity applications like Word, Excel, PowerPoint, and Outlook. We now face a different problem--multiple versions of documents, many that are only stored on a single hard drive or in a file cabinet. It is estimated that more than 90% of an institution's critical documents are not stored properly (Rockley, Kostur, & Manning, 2003). Many times hard drives are wiped clean or even printed copies are misplaced. Centralized sharing infrastructures become critical as institutions become more physically distributed.

SharePoint Portal Server is a flexible portal solution that lets users easily find, share, and publish critical institutional documents that are collected as part of the Self-Study review process. This product is relatively easy to set up and is easily tailored to institutions' specific needs. Once the working committees begin with the writing of the draft documents, easily accessible document locking, versioning, and publishing become critical features for committee members. Because SharePoint employs easy-to-use document management features that integrate with all the other Microsoft products, application training is minimal. The internal searching feature allows one to search within the documents to provide citations and link key references.

This pilot project was initiated in the spring of 2004 and will continue well beyond our NCA Self-Study visit that is scheduled for spring 2006. All units of the University participate and are empowered by this technology. For the NCA SharePoint Pilot, we created both public and private sites. Each Criterion Team had its own secure area that contained versioned drafts of their documents. Teams would move critical documents that were important to all of the NCA Teams to the master NCA site. This site was restricted to University faculty and staff from all of our campuses. Access to the sites required a secure connection to the University network. Remote access was allowed via Virtual Private Network Connections. Documents that did not require any security were moved to the public web location. Monthly newsletters were distributed via Outlook and then archived in the share documents portion of the portal, as well as the public web site. Training for each Criterion Team was provided prior to the full implementation of the project.

We hope to continually increase the number of documents in the reference library, and we intend to make sure that all critical University documents including agreements, environmental scans, etc. are preserved with this product. Team members are able to create documents, check them in and out, participate in threaded discussions, create surveys with immediate graphical outputs, and experience some of the concepts of the presentation.

By providing a place that connects people to contextually relevant information, services, and applications, we anticipate that this technology will be incorporated into many aspects of the University including direct instruction. By being able to locate and organize applications, information, teams, and people, we feel that this pilot will expand the rich collaboration experience and the sharing of organizational information throughout the entire enterprise. The most significant benefit of this tool is the ability to leverage the diverse approaches of planning to create one repository that supports accreditation and the institutional planning process. Individual units can continue to plan autonomously and submit the resulting documents to the planning portal. Representatives from institutional research, academic affairs, and IT review the documents to make sure they are appropriately described and tagged.

### **Lessons Learned:**

It is very important to invest in the appropriate technical training for those Information Technology professionals who will be providing the installation, maintenance, and back-up of this critical resource. This will normally entail sending a couple of the senior technical staff to week long SharePoint Server training. The initial planning process should include the appropriate server configuration, scalability, and disaster recovery. As with any technical resource, the total cost of ownership needs to be tabulated, and the finances secured before committing to this project. Most institutions already are utilizing Microsoft Select Agreements for product licensing. Recurring costs, like RAID drives, should be included in the overall cost planning model.

Although this product is very intuitive, it is important to have several key staff members that are formally trained in the user side of this product. They can assist in training other campus members and provide front-line helpdesk support for the entire campus. There are locations that also provide week-long User Training, but unlike the Server Training, this can normally be handled with online educational resources. As with any project, training at all levels is key. Teams should flowchart the portal design. This should include what, who, and how the information will be posted and accessed. Users of the site have different posting and access privileges and roles. SharePoint roles include Guest, Reader, Contributor, Web Designer, and Administrator. The latter has full rights from all other groups, plus manages site users and permissions, view usage analysis data, etc. Very few individuals should be listed as administrators. It is important to provide some level of hands-on technical training for any individual who has Contributor, Web Designer, or Administrative roles.

One of the hurdles is providing documentation for remote access. Campus authentication is required. We utilize Cisco Virtual Private Network (VPN) for remote authentication or wireless access. Many people did not understand why they could not reach the private area of the portal without utilizing the VPN client. Documentation for installing the VPN client for remote clients is available on the main university web page (<http://www.marshall.edu/ucs/CS/helpdesk/helpdesk-remote.asp>).

Some of the questions any user should ask include:

- How does this product move us forward?
- How does it fit into our strategic plan?
- What makes this the best investment of our limited funds?
- What are the ongoing consequences and costs?

In our case, SharePoint elicited positive responses to all of our concerns.

### **Conclusion:**

Transformative assessment systems are institution-wide assessment strategies that are based on institutional goals and implemented in an integrated way for all levels (the course, the program, and the institution) to systematically transform teaching and learning. The fundamental purpose of transformative assessment is to improve student learning outcomes. "Transformative assessment works by providing students and teachers with insight into learning processes and their results. It assumes that deepened insight will lead to individual, programmatic, and institutional improvements" (Erhmann, 2002). One of the first steps to reaching this goal is for an institution to historically review their recent past and provide planning strategies that present the desired outcomes.

### **References**

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