



WHITE PAPER

Creating your Intranet Checklist

About this guide

It can be overwhelming to run and manage an Intranet project. As a provider of Intranet software and services to small, medium and large organizations, we've assisted many people just like you in determining the real business need for an Intranet, and then supporting you in delivering a successful Intranet project.

This guide aims to provide an understanding of what you should be looking for in a modern Intranet. By no means is it a complete end-to-end checklist, but if you're new to sourcing an Intranet for your organization or have been tasked with finding a replacement product, then this checklist serves to position you well in comparing solutions and what you should be looking for when undertaking your evaluation.

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CHAPTER 1

Determining your business needs

The most important step in developing an Intranet checklist is to first understand what are the key business needs you and the organization are looking to solve. We've summed this up as:

- What is the business pain?
- What else can we leverage from the Intranet?

What is the Business Pain?

Implementing an Intranet won't solve all of your business problems. In order to understand the value proposition of an Intranet, you first need to determine what is the pain you're hoping an Intranet will solve. Following are common points of business pain for organizations, both small, medium and large.

No unified voice

Typically as organizations grow in size, or become teams that are separated over geography and even time zones, the ability for the organization to operate as a fully informed entity where every employee is on 'the same page' as the CEO, becomes increasingly difficult. Not everything happening inside an organization warrants an email from one person to another, or to many. In its most basic form, an Intranet operates like a discussion at the water cooler. In its more complex form, an Intranet harnesses ideas from the ground up allowing the executive team to improve decision making from the top down. A good Intranet allows anyone to understand what the 'beat' of the organization is.

Duplication of process & procedure

Another challenge for any busy organization is the scaling of process and procedure. Without a central 'trusted source of truth' like an Intranet, staff will usually email the tools to others to get work done. This commonly results in the duplication of process and procedure. Business efficiency is quickly lost when staffs rely on the wrong tools to get work done. If an Intranet provides the correct and most up to date tools to achieve different work types across the organization, then a reduction in duplication and lost effort will be realized.

Fragmentation of business applications

As organizations expand, the need for solutions to fill more gaps in the operation occurs. Typically these requirements use to be, and largely still are, managed and provided by the IT department. However the trend is that more and more non-IT departments are sourcing technology to solve operational problems. Thanks to SaaS (Software as a Service) applications being very easy to sign up and start using, staff representing HR, Marketing, Corporate Affairs and PR are now onboarding business applications to get things done. This causes application fragmentation. Departments aren't aware what each other might be using. As more organizations continue to use external applications to facilitate a need, an Intranet can solve this fragmentation by allowing the entire organization to see what other applications are being used. It can also handle the authentication to these various business applications, allowing staff to first authenticate with the Intranet and then be automatically logged into these other applications (depending on the user permissions).

Email is troublesome

The most prolific communication tool in any organization is email. It's also a big problem. We all use email and have watched it evolve into a communication protocol that can handle just about anything. But it's broken. Like a link in a chain, when people leave an organization, the communication chain they have created or participated in becomes broken. Email is the root cause of duplication. You and I can exchange the wrong documents, and either one of us can send it onto one hundred other people with the wrong action item. We can immediately cause confusion, complication, and frustration. When managed properly, an Intranet can reduce the reliance on email and remove the fragmentation and inefficiency of communicating to multiple parties.

A network drive is inefficient

Most organizations have network drives in all corners of the network. Some are used frequently; others haven't been touched in years. In most cases there is no ability to search and understand the context of the content stored in these locations. An Intranet changes all of this. Typically a new Intranet considers the migration of some or all of this content from network drives to the Intranet platform. Once stored in the Intranet, security, metadata and search are powerful layers that can be applied and provide context to the silos of operational information that are stored within any organization.

What else can be achieved using the Intranet?

An Intranet should deliver multiple benefits. Whilst the basic principle of an Intranet is to communicate information to various audiences, a modern Intranet can be used to automate data, security and workflow tasks that greatly improve how work gets done. Consider approaching your Intranet checklist with the idea of what other business processes can the Intranet be employed to manage. This could be any one of the following:

Authentication Portal

- The Intranet is the 'go to' environment to securely access other business applications currently running within the organization. Instead of signing into each of these applications, authenticating with the Intranet will then determine which users have access to these other applications

Business Processes

- **Forms**
 - Turn those current paper based forms into online Intranet based forms that can capture and route information electronically to a various audiences
- **Workflows**
 - Add workflow to form processes and command the routing of this information based on business rules, time of day, type of information, etc.
- **Analytics**
 - Create reports on form and workflow activities occurring across the Intranet in real-time
 - Build Executive Reporting Dashboards that enable management to view how a variety of business processes are occurring across the organization in real-time

Micro Web Applications

- **Exposing 3rd party data**
 - Connecting to and exposing data from other applications within the Intranet, and applying forms and workflow that are provided by the Intranet platform, enable organizations to create simple

yet highly valuable micro applications inside the Intranet. Some of these could include HR Job Boards, Asset Registers, pairing Customer Invoicing with Customer Contract documents stored within the Intranet, and much more

- **Capturing data**

- Using Intranet Forms enables the ability to capture and manipulate custom data, and then write this data into existing applications within the organization

Social Collaboration

- Some Intranet platforms provide comprehensive social networking tools that support user engagement, community building and tools that enable staff to setup groups, conduct open discussions and create a voice on a range of topics

A man and a woman in business attire are looking at a tablet together. The man is wearing a striped shirt and the woman is wearing a light blue shirt. They are both looking down at the tablet with interest. The background is a blurred office setting.

CHAPTER 2

Common Intranet functions

To assist you with creating your own Intranet checklist, the following are high-level functions that any modern Intranet should provide.

Security Management

Managing users within the Intranet is fundamental in defining which staff members can access what content within the new Intranet site.

User Management

Organizations require people, and a good Intranet supports the management of people. Managing user accounts and profiles is perhaps the most fundamental component of any Intranet platform. Some platforms do the minimum, while others have taken User Management to a whole new level. At the very least, the Intranet should enable you to define what users can view and author within the product. At the more sophisticated end, some Intranet platforms provide a LinkedIn-style profile management environment enabling users to manage their personal profiles; skills, experience, education, projects they've successfully delivered and more. Good User Management also drives services like Staff Directories, Organizational Charts, Expertise Directories and more.

Active Directory Integration

Long before establishing user profiles, managing the authentication of staff with the Intranet is required. Typically this authentication is provided using a service like Microsoft Active Directory. Staff profiles are first created in Active Directory enabling staff to authenticate with various applications across the enterprise, including the Intranet. Any modern Intranet platform will support Active Directory Integration as standard.

Single Sign On (SSO)

Taking the concept of authentication one step further, many organizations are treating the Intranet as the 'portal' to other applications across the enterprise. As such, once a staff member has authenticated with the Intranet, they can then freely navigate to other enterprise applications through the Intranet. Achieving this seamless navigation is possible through SSO, or Single Sign On. Any serious Intranet platform will provide its own SAML 2.0 compliant SSO agent.

Content Management

All Intranets manage content. Whether its web content in the form of Intranet web pages (HTML), documents or media.

Web Content

A modern Intranet is capable of managing different content types, and web content is perhaps the most common type of all. Most Intranet authors will design and publish web content directly within their web browsers. The content authoring tools within the Intranet platform will determine how sophisticated authors can be; the most simple Intranet will only allow simple text entry with some basic formatting like bold, italicizing and underline, while more comprehensive text editors will support inline styling, rich media embedding and spell checking support.

Documents

Managing document content can be simply displaying a document, through to highly sophisticated document management that supports the full document lifecycle of check-in, check-out, rollback, restore and more. In some cases your organization may already have in place a dedicated Document Management System, however modern Intranets provide very good environments for managing the full document management lifecycle. The benefits of considering document management within the Intranet is that it closes the gap on common work flows that occur within any organization; allowing documents and Intranet processes to share direct context.

Media

Some Intranet platforms will simply display a listing of media objects, while others will provide methods for utilizing media intelligently within an Intranet in the form of embedded video players, image galleries and more. In an age where staff can capture 1080p video using their smart phone, a modern Intranet can be expected to support the publishing of multiple video formats.

Metadata Management

Metadata is 'data about data'. In social media, we all know it better as 'tagging'. These are *#example #tags*.

Metadata is how content, primarily web content and documents, are tagged within an Intranet. Imagine your organization has 100 staff and each staff member publishes on average 10 documents a week, and lets propose that half of these documents are checked into the Intranet where they are version controlled and where appropriate security is applied. Within a year, that's approximately 25,000 documents being published to the Intranet. Without metadata how do you categorize, filter, search and discover this content?

You will need to define a metadata taxonomy. This is a hierarchy of how you will tag web content and documents within the Intranet. A typical taxonomy might look like the following:

- **Finance**
 - Orders
 - Draft
 - Release
 - Sent
 - Invoices
 - Reports
- **Marketing**
 - Local
 - National
 - International
- **Branding**
 - Digital
 - Print
- **HR**

- **Applications**
 - January
 - February
 - March
- **Onboarding**
- **Reviews**
- **Reports**

The best way to view a metadata taxonomy is to consider it to be no different to a traditional folder hierarchy.

Forms

Perhaps one of the most powerful features of any modern Intranet is the ability for non-technical authors to design, create, publish and manage forms on the Intranet. Most organizations are littered with paper-based processes where Intranet forms provide one of the greatest opportunities to replace these inefficiencies and step towards a paperless environment. Coupled with Workflow Management, organizations can start to consider the Intranet as a platform for automating true business processes.

Workflow Management

Most organizations deal with workflows of all shapes and sizes. If you email certain documents to particular team members at certain times of the week or month, that's a workflow. If you aggregate information from various parties into a single document for distribution, that's another work flow. Using the Intranet to automate these tasks is considered as Workflow Management. Intranet platforms vary in their workflow capabilities; some offer simple 'triggers' to influence areas of the Intranet when something occurs, while other Intranet platforms allow authors to design and establish very complex multi-step/multi-conditional workflows that effect multiple people and processes. It's important to establish if your organization is ready for change that can come with workflow automation.

Search

As Intranet's grow in content over time, the ability to provide relevancy when staff search for content is critical to the Intranet remaining purposeful and effective. Some Intranet platforms rely on 3rd party search solutions, while others provide their own integrated search. The search experience varies from Intranet solution to the next; the most simple experience is returning a list of results for the keyword or phrase entered, while others will provide weightings, highlighting of searched terms and the ability to search within search results. As most Intranets manage both structured and unstructured content, search should also be indexing within document and form data.



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