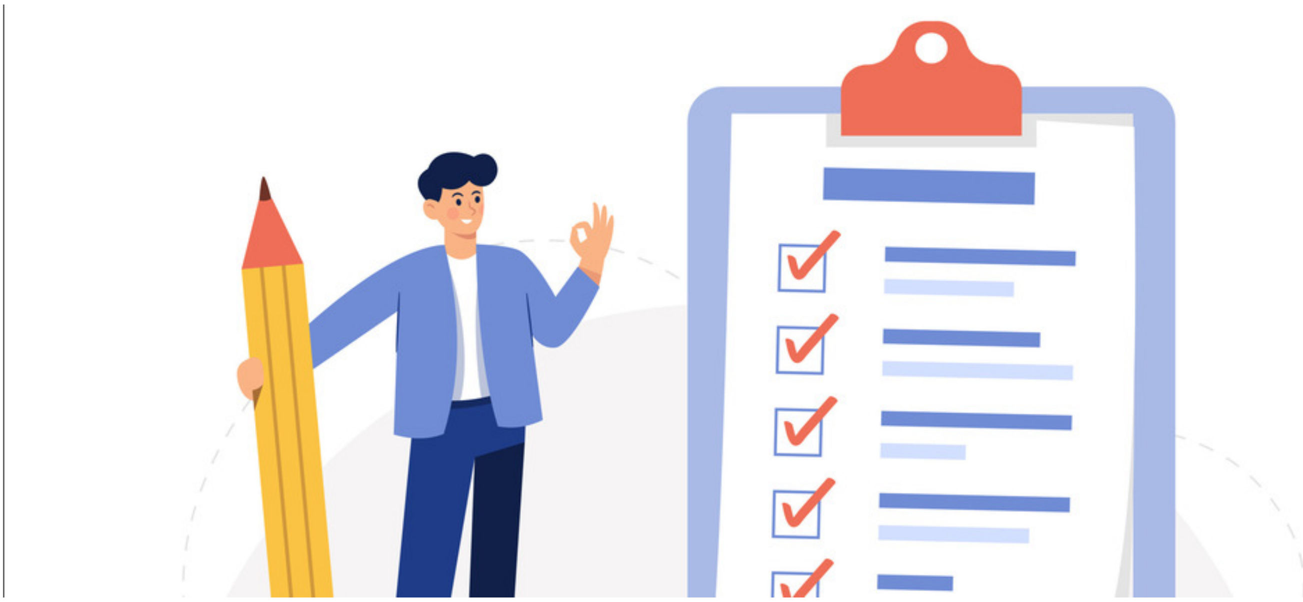
Link to article: https://discover.claromentis.com/knowledgebase/articles/1008



Pre-Site Launch Checklist

This article is a checklist for Intranet Administrators who are looking to launch their site to their end-users as part of the Claromentis Onboarding process. Please note that Intranet Administrators should ideally have completed a "soft-launch" of their site to a number of end-users before starting this process. Please find the Knowledgebase article "Running an Intranet Soft Launch" here.

Introduction

Introducing your new Claromentis intranet to your organisation is an exciting moment, and a huge step in enhancing your internal communication, collaboration, and productivity. However, a successful intranet launch goes beyond providing your user base with the URL - it requires careful planning and review to ensure it meets the needs of your end-users and gains widespread adoption.

This Pre-Site Launch checklist is tailored specifically for intranet implementations, guiding you through the essential steps to prepare your platform and your organisation. From testing functionality, building out content, to developing a communication plan and training users, these steps will help you set the stage for a smooth and impactful launch.

1. Content Creation

☐ Design your ideal homepage

Ensure your homepage includes components from frequently used apps and important information such as:

- Greeting
- News
- Buttons
- Thank You
- Events
- Recent Articles from Knowledge Base
- People List component
- Polls & Surveys
- Birthdays/Anniversaries

This helps to reinforce the intranet's reputation as the go-to resource for company updates as well as a springboard to other tools and programs.

☐ 10 Minutes of content

Have at least ten minutes worth of interesting content to read. A user's first visit will influence their ongoing belief in the system. An initial visit will on average last at least ten minutes, and a user should not be left feeling that they have exhausted all available interesting content in that time. They should end their session feeling engaged and excited to return.

☐ Create Pages and Structure Menu

Set up Pages and plan the main navigation menu to help users find their way to the different areas. In most cases, the menu includes:

- Home
- Company Information (page)
- Departments (page per department)
- Forms / Tools (links directly to the Intranet or external applications)
- Culture (page)

☐ Populate all your Pages

Have you ensured each page has a reasonable amount of content and components on them? Ensure that each departmental page/section of the website doesn't feel incomplete. If you don't know what to include on each page, you can consult with the heads of your department to ensure you have everything they require. Alternatively, you can grant them page editing permissions so they can populate the pages how they wish.

☐ Content Managers

Have you chosen users to be content managers? Appoint Content Managers to add News, Events, Blogs, etc to your intranet. They won't be given full control in the same way as administrators, but they will be given permission to add new content to keep the site fresh. We recommend creating a Role (in People > Admin > Roles) called "Content Managers", and then adding them to the permission settings of your news and blog channels, event categories, etc.

☐ Company Links

Have you made use of Company Links? Company Links are accessible from the navigation bar and provide users with quick access to external or internal links from any page on your intranet, rather than only from the homepage.

☐ Application Menu

Have you hidden the applications you aren't using? It will be very confusing to users if they open the Applications menu to find the full range of over 20 Claromentis applications. Users will either feel they need to click them all or none of them, so keep your Application menu relevant to what they'll need. Go to Admin > Menu Builder > Applications, and click the Hide "eye" icon next to the applications you wish to hide for everyone. (Instead if the application should remain accessible for some users but not others, simply update the permissions on the icon to only include those you wish to see it)

☐ Integrations

Would you like to add a weather component to your homepage indicating where the main office is located? If your site is hosted on premise (self hosted), ensure you've followed the steps in this article - If you are a SaaS customer, you will need to contact your Onboarding Account Manager instead as we can set this up for you.

Claromentis has other integrations for your team to consider e.g. Microsoft Onedrive, Google Drive, Google Analytics.

2. Set up & Configuration

☐ Populate Users

Ensure that all members of your organisation are added to the site. Users can be populated as standard manually (individually or in bulk) Admin > People. If your site has a sync set up then user creation is handled by this automatically instead via the connection with your Active Directory/other external repository.

☐ Set User Groups & use in application permissions

Have you reviewed your user Groups added users as members and entered these into permissions for applications you want them to use? These usually start as department/location-based i.e. HR, Marketing, UK, but more can be added over time to cover any need in your demographic. Your users should be organised into as many Groups as you think will be relevant. Keep in mind that you'll be controlling permissions to thousands of objects, and having a sensible number of groups will make it easier to manage.

☐ Set User Roles & use in application permissions

Are you happy with your user Roles? Once you've set up Groups, you may also wish to consider Roles. They serve the same function as Groups (for managing permissions) but are intended for organising users by Intranet responsibilities. Ensure you have added users to Roles and placed these across applications in permissions boxes to give access to its members.

Examples of popular Roles:

- Intranet Administrators
- Content Managers
- Policy Administrators
- News Editors
- Page Editors
- Infocapture Administrators

Create User Profile fields & Skills

Decide what information you wish to store for each user, start with basic profile fields and encourage users to fill these out after their first log in e.g. Interests and past experience. Administrators can add new fields or fill out others on behalf of users at any point to maintain this from People > Admin > Configure user profile fields.

Have you made use of Skills?

Build a list of Skills under Admin > People > Configure Skills, so that users can select their Skills and level of expertise, for example, “Expert” in “SQL Server management”. Users can endorse each other for Skills as well.

Consider creating Org Charts

Have you made use of Org charts? This can be a nice touch, to show who sits under which department. Org charts will fill out based on each user’s ‘direct report’ and ‘Manager’ field on their profile having been updated, which a People administrator can do.If your site uses a sync to update this instead, then these fields will reflect and are managed by your Active Directory/other external repository.

Once created users can view charts they have permissions for in the application or instead administrators can link them to certain charts (buttons/menu items) or the downloaded image can be placed on an Intranet page for users to see.

Password Policy

Have you specified a password policy? You can set rules users passwords must adhere to, an expiration date and how many incorrect attempts are allowed before an account is locked under Admin > People > Password Policy.

Train Administrators

Do you have a knowledgeable group of sysadmins and application administrators to help run the site? This should include those included in the Onboarding process at least. If you try to manage the intranet alone, it’s quite likely that you will struggle with the new workload and questions from your users. Spread the work amongst several intranet administrators. Once trained, they can be given application administrator rights to every application by a sysadmin via Admin > System > Administrators.

Date & Time & Language Format

Have you chosen the correct date and time format, and timezone for your site? Go to Admin > System > Date and Time to change these formats and the default timezone.

Applications set up

Are all the applications within your Onboarding Deliverables Document set up and working as expected? For example, if you are using Holiday Planner, is this configured with the necessary Manager approval process? Have you set up the right zones and groups? If you are using Policy Manager, are all the policies now stored within the application, and do the correct managers have the permissions to edit and upload? If you are unsure about any of these, please contact your Onboarding Account Manager for an explanation/demo.

Configure default site notifications

Would you like your end-users to receive notifications from the site? If so, would you like these to be in-system notifications and/or email notifications? Ensure you have set default notifications for your end-users by navigating to Admin > Communication > Reset. Please be aware that each user can change their individual notification preferences themselves once they log in, but it is good practice to set a default for them to begin with.

Create Documents folder structure

If you are using the Documents application, have you reviewed the “root level” folders currently created on your site and the permissions set at each sub level? It’s very important to have a logical and intuitive folder structure laid out and ready for use before you go live. Appropriate permissions being set on each folder/file ensures users can see what you want them to and find it easily.

☐ Activity Monitoring

Are your system administrators aware of how they can monitor activity on the site? Do you know how to use the Statistics and Audit log application to monitor usage for your end-users? If not, please refer to the relevant knowledgebase articles. We recommend that you have dedicated time set aside post-launch to review employee engagement and uptake, so you have an informed idea of how your site is performing.

3. Feedback

☐ Soft Launch Feedback

Have you run a successful soft launch of the site to a few end-users across different departments? We recommend doing this to gather feedback, and ensure this is reflected in the final version of the site before introducing the site to your whole organisation.

☐ Onboarding Account Manager consultation

Are you struggling to know what more you can do? We would recommend consulting with your Onboarding Account Manager, who can provide a short review of your site, and outline some next steps for you to take to ensure.

4. Launch Materials

☐ Introduce the site

Do you have an email/video/webinar written to introduce your users to the site and prompt them to log in for the first time? If not, check out the following Knowledgebase article on Site Launch Templates here.

☐ Timings

Do you have a set time agreed on when you are going to officially introduce your site? This is so you can have a group of administrators on-hand to answer any questions from end-users, and monitor the functionality when everyone logs on. Please also ensure that your Onboarding Account Manager is aware of your launch date, so that they will be on-hand to support you with any technical issues.

☐ Phased vs full launch

Are you doing the launch in phases (to Managers/Department Heads first) or all at once? This is something you should aim to decide before you fully introduce the site to your end-users.

5. End-User Training

☐ Training Plan

Will your standard end-users need training on how to use the site/navigate certain applications? If so, do you have a plan to introduce, train and encourage them to use the site. If you're struggling to know where to start, please check out our handy End-User Training Knowledgebase article for inspiration.

Conclusion

By following this Pre-Site Launch Checklist, you've laid the foundation for a successful rollout that meets the needs of your users while ensuring your platform is engaging and intuitive.

Remember, the work doesn't stop at launch—continuous engagement, regular content updates, and monitoring user feedback is key to sustaining the success of your intranet.

Remember, if you are stuck with anything, don't hesitate to reach out to your Onboarding Account Manager for further guidance and support.

With careful planning and execution, your intranet will become an essential hub for your team, driving productivity and connecting your workforce more than ever before.

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Tags: end-users, onboarding, soft launch, site launch, administrators, checklist, pre-site launch