Intranet Launch Checklist

Archived

☐ One - Two Weeks Prior to Launch

Generate intranet awareness

Intranet teasers

Generate awareness of your new intranet by giving users a taster of what they can expect from the new system. This might include:

- Posters with intranet teasers, create intrigue and interest
- Email campaign including screenshots of useful features, the intranet homepage, etc • Intranet-branded merchandise like mugs, stationery, or confectionary promoting your new intranet logo, design, etc.

Video preview

Create a short video showcasing the main intranet features to use as content on your homepage and/or a Knowledge Base article for future reference. The Claromentis onboarding team will be able to do this for you.

Prepare Knowledge Base articles ready for your new users

Create bite-sized Knowledge Base articles to help users navigate their way around the system. Try using screenshots of your own system, so that users can easily relate to the information. The Claromentis onboarding team will be able to do this for you

☐ Pre-launch checklist

☐ Design your ideal homepage

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

- News
- Fast Access Button

- Thank You
- Events
- Latest Article from Knowledge Base
- Staff component
- Polls / Survey

This helps to reinforce the intranet's reputation as a springboard to other tools and apps

☐ **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 Departmental Pages and plan the main navigation menu to help users to navigate to the different areas. In most cases this includes:

- Home
- Company Information
- Departments
- Forms / Tools
- Culture

☐ **Set Documents folder structure**

Have you reviewed the "root level" folders in the Documents application? It's very important to have a logical and intuitive folder structure laid out and ready for use before you go live. Once users begin adding documents, rethinking your folder structure, later on, will be a very time-consuming task.

☐ **Add a simple e-form**

Have you made use of InfoCapture, our e-forms and workflows application? By moving paper forms to e-forms, you create a tangible need for staff to use the system. The intranet should have at least one work-critical tool to ensure its widespread usage; without this, your system could become a passively visited "nice-to-have" site rather than something essential. You can find some e-form inspiration and free templates here

☐ **Set User Groups**

Have you reviewed your User Groups? 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**

Have you considered putting users into 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 similar job titles and roles within your company, rather than by responsibilities or locations.

The most commonly used Roles are "

- Intranet Administrators
- Content Managers
- Staff
- Managers
- Executives

☐ **Set User Profiles & Skills**

Decide what information you wish to store for each user, you can start with a basic profile and encourage users to complete their profiles including Interests and past experience.

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.

☐ **OrgChart**

If syncing with Active Directory, have you synced users' managers? Doing so means you won't need to manually input your management hierarchy into the Org Chart app, as this information will be pulled through automatically via Active Directory.

☐ **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.

☐ **Password Policy**

Have you specified a password policy? You can set a password expiration date and how many incorrect attempts before an account is locked under Admin > People > Password Policy.

☐ **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.

☐ **Train Administrator**

Have you chosen and trained other administrators to help run the site? 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 you've trained them, set them as application administrators via `Admin > System > Administrators.`

☐ **Content Manager**

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 called "Content Managers", and then adding them to the permission settings of your news and blog channels, event categories, etc.

☐ **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.

☐ **Populate Users**

Users can be populated automatically through Active Directory integration or uploaded manually or in bulk in `Admin > People.`

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Intranet Launch Ideas
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☐ The Launch Day

Notify all users of the intranet URL and login details.

This is key information to convey to your users. Depending on how your system is set up, you can simply communicate the intranet URL and then Active Directory/Single-Sign-On takes care of the rest, or if you chose to have local accounts you will need to contact individual users with their login details.

☐ One - two weeks into the launch

Make it into a competition

Create a list of tasks you want your users to complete on the intranet, with the top 5 users awarded a prize. You can also use the Quiz application to check users' knowledge of important features that you would like them to use.

Encourage users to complete their profiles

It's worthwhile using this early stage to promote the importance of keeping profile information accurate. You can promote this on your homepage by using the Greetings or Text components, to say something like "click the icon to the left to update your profile".

Would you like to remind users to regularly update their profiles?

Go to `Admin > People > General Configuration` to set up this notification. It will require creating a profile metadata field to keep track of when the last update occurred.

Community Blog

Have you considered a community blog or news channel which everyone can add to? The key to engagement is to give users a level of autonomy. At the start, a user can edit their profile and gain a feeling of having contributed to the system. But you can take this further by giving them ownership of a part of the system. If they feel trusted in this way, then they are more likely to remain engaged with the intranet. Consider the following ideas:

- Create a poll for users to contribute to, like naming the intranet or voting for the most useful features
- Create a feedback tool using a Survey
- Create an Idea submission form using InfoCapture

Intranet presentation

Make a series of events where departmental managers/content managers present their department page to the rest of the team. This could be a part of the launch day.

Encourage inter-departmental discussion

Organise a Q&A using the Discuss app, where everyone is encouraged to ask questions and get feedback. Create departmental pages with their own Discuss channel to streamline conversations.

Last modified on 5 February 2025 by Abigail Yap