Handover guidance for changes to your Intranet management team

Overview

Working landscapes are dynamic and the members of your intranet management team are likely to change over time.

New personnel will need to be trained to manage your site and any individual(s) leaving will have responsibilities that need to be picked up by the rest of your team or passed on to another.

As our support teams work in collaboration with your intranet management team to resolve any issues or enquiries, it is important that we at Claromentis are made aware of any changes to the individuals involved and our contacts are up to date.

If changes are being made to your team, here are some important steps to take to avoid any disruption of support:

1 - Make Claromentis aware of your personnel or best contact changes in a support ticket

2 - Showcase your site to any new user(s) and take them through the critical applications, processes, or areas for which they will be responsible

3 - Ensure the new user(s) has administrative rights where required to fulfil their new duties

4 - Direct the new administrator to undertake our eLearning Courses

1- Make Claromentis aware in a support ticket

If there are team members on your side that are no longer going to be involved with your intranet management, or a new individual is becoming your main contact, please let us know in a support ticket so we can:

- Block any profiles no longer needed on Discover for individuals that are leaving your intranet team

- Set up any new Discover account(s) required to reflect your personnel changes and guarantee they can submit tickets as necessary

    - (Full name and email address required to create new accounts).

- Ensure all other user contacts we do have for you are up-to-date

    -Our teams sometimes submit tickets on clients' behalf, including upgrade requests or those for technical reasons, so it's essential the Discover users available for your team are current, able to receive notifications, and responsible for your intranet.

- Offer training to the new user(s) as appropriate

Failure to update Claromentis of changes in your intranet management personnel could result in delays or difficulties when providing support. In this

2 - Showcase your site to your new user(s)

We appreciate Claromentis is a vast product to get to grips with, and becoming confident using it takes time and effort.

Any team member that is no longer going to be involved in managing your site will take away a lot of information specific to your system with them which, without being passed on to another person or documented, is lost.

It is recommended and appreciated that any user leaving your intranet management team shares the knowledge they have with your other team members ahead of time.

This will ensure your newer members have company-specific documentation to refer to, are clued-up on the parts of the intranet most important to you, and understand the fundamentals of how it's currently being managed and what they are responsible for.

We understand your intranet management team also has other duties to perform that are not intranet related, so any handover that can take place for your new users really is appreciated when factored in. It is mutually beneficial for new members to be supported by your team's client-side as well as to be able to reach out to ours.

3 - Ensure the new user(s) has SysAdmin and/or application administrator rights as required to fulfil new duties

When a new user takes over intranet management duties, it's likely you will require them to become an administrator of all or most of your site.

Follow the steps below to ensure new users are given SysAdmin, application administrator and front-end permissions that will allow them to perform these duties.

3a - Make them a SysAdmin and/or application administrator (of any/all applications that are required) which gives access to the admin side of each application.

3b - Add them to any intranet administrator, People roles or groups your site has created.

- This will ensure they see all content when accessing the front end of applications where these roles/groups have been entered (and not just the admin side via their application administrator privileges)

- More generally, you can look at a current administrator's membership on their user profile from Admin > People and simply add the new user to the same ones to match their access.

- This ensures the new user will get all the permissions across applications where these roles/groups have been set in one swift move.

- If your team manage your users completely manually, users can be added to Roles and Groups on their profile from Admin > People or en masse using a CSV import.

- If your site is using a group sync, the Group changes for the new administrator will need to take place in your external repository first and then a sync run to see the updates in the Intranet. e.g. Update the users group membership in Okta, Azure, Active Directory, etc and then trigger a sync from Admin > People > Sync > Reset.

Please be aware: Anywhere in permissions across the site that has individual usernames entered rather than roles/groups will not give the new user access, unless permissions are manually updated for them there as well. This is why it's best practice to define roles/groups in permissions as much as possible because new users can simply be added to a role/group to get the same rights wherever it has been used, and no further manual changes are required beyond this.

3c - Ensure they can see the Admin icon in their application list to give access to the admin side of applications.

Head to Admin > Menu Builder > Applications and click the key against 'Admin' to check the new user is included in permissions and add a role/group they are a part of if not, click 'Apply permissions' to save
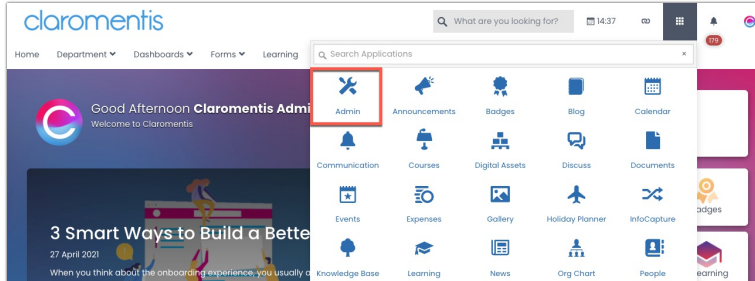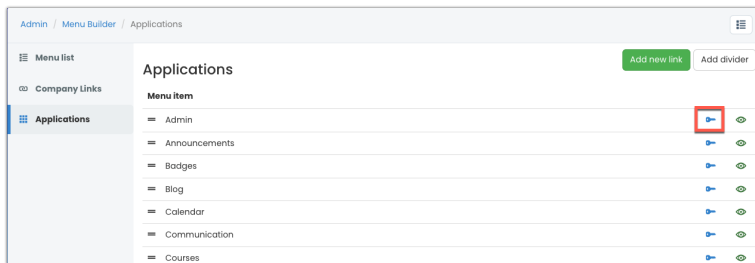
4 - Direct the new administrator to undertake our eLearning Courses

Our support team have created eLearning courses to give a fundamental grounding in the management of the Intranet, which can be completed on Discover.

We recommend that any new administrator is instructed to complete Courses 1 to 4 before fully starting their new role in your Intranet team. (Course 5 onwards are for applications your site may not be using, so the new administrator should complete all applicable)

The knowledge obtained from these courses means they will hit the ground running, already know the basics of the most popular applications and coupled with the business-critical processes already passed to them internally from step 2, they are an effective administrator as fast as is possible.

If you have any further queries or concerns please submit a support ticket and we'll be happy to help :)

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