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| **Stage** | **Objectives** |
| Onboarding | * The org unit and ITS have determined that an org unit intranet is the right solution
* The org unit has an internally approved proposal for creating and maintaining their intranet
* The org unit has roles and responsibilities defined
* The project team has a sandbox site and roles identified for training
 |
| Discovery | * The org unit has a clear understanding of the problem(s) to be solved
* The org unit has the purpose, priorities and scope of the intranet build defined
* The org unit has information security requirements defined
* The implementation team has completed training
 |
| Architecture and design | * Make key decisions about the structure and organisation of your site
* The real org unit site can be created once certain decisions are made
* Plan the build, launch and maintenance of the site
 |
| Build | * The site is built according to the plans created in the design phase
* The launch is planned
 |
| Launch | * Conduct quality checks
* Launch site
* Post-launch fixes and communications
 |
| Drive and maintain | * Drive adoption
* Ensure benefits are realised
* Maintain and enhance intranet to meet needs
 |

# Onboarding phase checklist

In this phase you confirm whether org unit intranet is the right solution, your resourcing and skills, and get the go-ahead to proceed.

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|   | [Contact ITS](https://support.staff.uq.edu.au/app/support/p/1057/c/1573) to set up an initial kick-off meeting to:* Confirm whether org unit intranet is the right solution for your needs
* Understand what's offered in the org unit intranet service , including the support available from ITS
* Understand what would be involved in creating an intranet for your org unit -- skills, resources, time, etc:
	+ review the planning process, governance model and training requirements
	+ discuss any advanced functionality requirements
 |
|   | Identify your sponsor and project team, and align internally on matters such as:* key roles and responsibilities
* resourcing
* timing
* relationship to other strategies and projects
 |
|   | Do a quick audit of the likely content and scope of your intranet - what do you currently have where, how much is there, what state is it in, and who needs to access it? |
|   | Talk to similar size and type org units who have already built their intranet |
|   | Create an internal project proposal and get internal approval to proceed |
|   | Training for key roles identified and requested |
|   | Sandbox site generated |

# Discovery phase checklist

In this phase you uncover everything that might need to be in scope and then set the purpose, priorities and scope for your initial implementation.

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| **Training and preparation**  |
|   | Project team members complete training  |
|   | Consult staff and key stakeholders through workshops, interviews and/or surveys to identify their requirements and priorities. |
|   | If you have an existing intranet, conduct a usability survey (supplied by ITS) with your org unit staff to establish a baseline to compare with new intranet |
| **Content and functionality discovery** [Audit template (XLS, 17 KB)](https://staff.uq.edu.au/files/89265/Audit-template.xlsx)  |
|   | Audit the existing content buckets (including functionality & tools) used for information sharing and communication within your org unit |
|   | Identify any additional content gaps, pain points and/or requirements not addressed via existing content buckets  |
|   | Identify the permissions for each content bucket – who needs to view, and who needs to edit?  |
|   | Identify any unique requirements for content buckets (e.g. additional templates, special approval processes, metadata)  |
|   | Perform gap analysis – can org unit intranet meet those needs?  |
| **Strategy, scope and governance**  |
|   | Confirm intranet governance roles and key stakeholders |
|   | Draft org unit intranet purpose and priorities  |
|   | Define scope and objectives for initial build and release  |
|   | Define any additional local governance processes, roles and responsibilities  |

# Architecture and design phase checklist

Start by keeping things as simple, standard and open as you can. Only customise or restrict if it’s essential.

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|  **Information security** |
|   | Define if any additional sites need to be created for information security reasons |
|   | Define who needs to be able to view and edit within in each site |
|   | Identify how you'll give all staff in your org unit access to the intranet -- is there an existing all staff group? Is it kept up to date? |
|   | Define if any additional permissions are needed for people outside your org unit (should be very limited) |
| **Page design and information architecture** |
|   | Define additional content types and templates (if required) |
|   | Define overall content structure and hub navigation menu |
|   | Define topics needed |
|   | Define lists and views needed |
|   | Define additional libraries needed (if required) |
|   | Design key pages – home page, key landing pages, key content pages |
|   | Confirm recommended use of page naming and file naming conventions |
|   | Confirm recommended structure and naming of document library folders |
|   | Define use of additional term sets (if required) |
| **Content creation/migration plan** |
|   | Identify content creators and the content production process |
|   | Create plan for content migration |
|   | Determine what will happen to the old intranet, e.g. switch to read-only, decommission |
| **Governance and management plan** |
|   | Review roles and responsibilities the intranet and key content buckets (as they may have evolved) |
|   | Review the intranet purpose and priorities (as it may have evolved) |
|   | Define content maintenance and monitoring schedule |
| **Request real site from ITS** |
|   | Meet with ITS support to review your architecture and design plan to ensure it is feasible and can be supported |
|   | Request your real site be created (allow 2-3 days) |

# Build phase checklist

This is the phase where all your architecture and design plans will be executed. Monitor the build to ensure standards are being followed.

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|   | Build and configure the site structure based on design plan (pages, lists, libraries etc)  |
|   | Build the Term store hierarchy – term sets and terms  |
|   | Configure approvals if applicable |
|   | Plan and communicate upcoming content freezes and/or dual publishing processes as launch approaches |
|   | Source and upload images for home and landing pages, and image library if needed |
|   | Onboard content owners and editors -- training, orientation, support |
|   | Create and migrate content - pages, documents, lists  |
|   | Conduct spot checks to ensure content standards are being followed and topics are being applied correctly  |
|   | Plan how staff will be redirected from the old intranet to new |
|   | Create launch plan including quality checks, approvals and communications |

# Launch phase checklist

The following checks should be completed on all sites within the hub prior to launch.

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|  **Content and links** |
|   | All test/placeholder content has been removed |
|   | All pages have been assigned one or more topics and a page type |
|   | Comments on home page, content pages, landing pages, utility pages, are switched off |
|   | Review dates added to all pages |
|   | All news posts are current for launch |
|   | All events are current for launch |
|   | Blank pages / partly built pages are removed or completed |
|   | Review any unpublished pages for publishing/deletion |
|   | Meaningful and concise descriptions added to pages  |
|   | Check for broken links - within site pages and hub navigation |
|   | Correct heading levels used |
|   | Sentence case is used instead of title case (except for proper nouns and names)  |
|   | Suitable, high-quality images are used |
|   | All images within image web part have alt text (not header or thumbnail images)  |
|   | Check that “All pages” and “Related pages” content is displayed correctly from relevant sites |
|   | Meaningful link text is used (avoid ‘Click here’ link text) |
|   | Buttons are not overused  |
|   | Ensure site is using default theme settings |
|   | Redirects organised from old intranet (if UQ domain, submit an IT request) |
| **Information security and permissions** |
|   | Any automated approval flows enabled and tested |
|   | Check permissions and sharing reports on each site  |
|   | Review all sites and remove any custom or unique permissions on site pages and documents libraries |
|   | Check with ITS if your existing "all org unit staff” AD group is the right kind of group to be added to the 'Site visitors' group and do random tests before launch. |
|   | Unique permissions granted for either review or testing purposes on individual sites within the hub should be removed for individuals who will be a part of the "all org unit staff" AD group. |
|   | Unique permissions granted to users from another org unit or an external organization for either review or testing purposes on individual sites within the hub, should be removed for individuals who will not need permissions after launch. |
| **Approvals and launch** |
|   | Approval obtained from Intranet Sponsor for launch |
|   | Communicate launch date to all org unit staff |
|   | Remove any content owners added to the visitors groups on all sites |
|   | Launch - Add "all org unit staff" AD group to site visitor group on all sites |
|   | Launch - Add additional visitors outside the org or external to the University individually to site visitor group on all sites |
|   | Launch - Enable redirects from old intranet if applicable; remove access to old intranet if applicable |
| **Immediate post-launch**  |
|   | General check and test (including access is working, redirects are working) and fix any errors |
|   | Announce launch to all org unit staff |
|   | Alert editors that content freeze/dual publishing is now over |
|   | Update new staff onboarding processes to include an overview of the intranet for new staff. |

# Drive and maintain phase checklist

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|   | Governance and management plan takes effect  |
|   | BAU governance and operational processes begin |
|   | Regular maintenance and monitoring  |
|   | Continuous improvement and optimisation to further utilise SharePoint and M365 capabilities  |
|   | Continue to promote intranet for 2-3 months internally  |
|   | After 8-12 weeks, repeat the usability survey to see how the intranet has been received (and compare with the old intranet survey, if applicable). |
|   | Monitor monthly reports (usage, maintenance/quality and adoption)  |
|   | Decommission old intranet when appropriate |