Insider 3.0 Solution Overview

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# Overview

The Insider empowers associates across the company to better serve our customers. It provides tools and resources in one handy “Go-to” solution. But more than that, it involves and engages associates into the Umpqua community. Associates can easily see what Umpqua has been up to, what our goals are, where we’re headed, and what it means to be a part of our team. In short, the Insider is a critical part of making Umpqua the “World’s Greatest Bank”. Unfortunately, time passes, and projects like the Insider change hands, change focus, add features and make updates that don’t fit well into the original vision. This evolution tends to lead to disorganization of assets, over taxing of resources and general clutter in both the design and the code behind that design. Even in the best of circumstances, this leads a project to become increasingly difficult to move forward by requiring major revisions just to add one new feature. Eventually, starting from scratch becomes the only viable way to move forward.

The Insider does not currently meet the needs and expectations of our Corporate Communications partner and there are substantial challenges in maintaining and enhancing the existing solution. There is currently a significant resource investment required for the day-to-day care and feeding of the Insider. With a rebuild of the Insider, that resource investment can be reduced and the needs and expectations of our Corporate Communications partner can be met.

The agile term for where we currently are at is called “dead core”. It is a place where the focus should be overcoming problems so we can have a much faster velocity. An analogy would be a plate of food at a restaurant that doesn’t taste good. Even though you might be able to improve the taste with spices, sometimes it is best to re-cook it with fresh ingredients and that is what Insider 3.0 (the re-build) is all about.

# Vision

The vision of this document is to imagine a new Insider built from the ground up using a Sharepoint Template. Improved integration with Sharepoint will empower leadership to leverage all the features Sharepoint has to offer. Rebuilding will help TAG to increase the velocity, performance, and capabilities of new features. Lastly, using a Sharepoint template it will asset designers in creating a more intuitive and productive Insider with more efficient navigation, better search features, and shorter development times. All this adds up to making the Insider the best it can be so it can serve our associates in delivering superior service.

This document is about better-making the Insider to be “The World’s Greatest Intranet”

# Current Challenges

Ongoing problems in scope that will be corrected include

1. Cascading Style Sheets (CSS) issues
   1. The CSS was implemented incorrectly and incompatible with any new features and greatly slows down the velocity of sprints. Even though CSS is just cosmetic it is the most visible. The CSS is also incompatible with bootstrap which is a very popular and powerful responsive framework that is a standard.
   2. Our styling and branding is greatly limited by the CSS issues. Is overly difficult to do simple things including using basic html elements without abnormal behavior of them. For example the font size of H1, H2, H3 and H4 are identical which defeats the purpose of them.
2. Javascript (JS) issues
   1. There are many JS issues prevalent in the current Insider solution. These issues contribute to the slow velocity of creating and updating features. The legacy JS is overly complex and dated. Some of this JS causes bugs with other features such as the news auto rotation carousel sporadic bug is caused by JS that is not related to the news feature.
3. Performance issues
   1. Slow loading times, especially on the home page.
   2. The current Insider database consumes a massive amount of resources causing the Insider to completely fail or become unresponsive at times (usually morning and after lunch)
   3. Part of this is the foundation of the site but part also the database being over taxed. Our intranet should be very quick.
   4. A lot of improvements have been made to the masterpage but a lot more will happen with Insider 3.0. Ideally all of the JS, CSS and libraries will be minified and combined to reduce downloaded items size and count, which will reduce the page loading times.
4. Responsiveness
   1. Not everyone has the identical size screen and the Insider should be responsive to it. Maybe not mobile at first but putting into place the foundation to support tablet which starts with the layout (masterpage) including header, navigation, footer.
5. Deployment issues
   1. Deployments can be a nightmare due to issues around the masterpage.
6. Taxonomy issues
   1. The Insider needs to incorporate the taxonomy work done.
7. Targeting issues
   1. The current Insider does not utilize targeting (audience) to offer different capabilities to different users.
8. Flash issues
   1. Flash is dated technology that is not supported on all platforms. There are zero reasons to use flash and zero reasons we should have it. Some components, like the Connect Ticker, utilize Flash and will need to be rebuilt with JS. The current flash ticker prompts a credential check in Chrome.
9. Structure
   1. Each department should have its own team site to allow for autonomy for each group.

Some of the problems out of scope or out of our control are:

1. IE Compatibility Mode Group Policy
   1. Ticket about this exists and was denied but still a critical ongoing enterprise issue across all teams, yet incredibly easy to fix.
2. Service packs and cumulative updates
   1. All Microsoft products have bugs, let’s take advantage of new updates, patches.
3. Staging issues
   1. Staging has caching issues and has server errors frequently.
4. Permissions issues
   1. With the test domain it is difficult to access systems in addition to QA, Business.
   2. With dev environments being on a test domain it is problematic with credentials, tfs, proxy, and there are times it would be great to let a business owner answer a question around a feature in development.
5. ACE support and deployment issues
   1. Some deployments can take a long time or too complex, looking to simplify them, take the head ache out of them.
   2. The database should not be over taxed.
6. QA issues
   1. With QA being on a test domain is problematic with credentials, TFS, proxy. QA doesn’t have an SSL cert so for some QA testing using this environment was not possible.
7. TFS issues
   1. At times it is very difficult to check code in with TFS.
8. Caching issues
   1. Staging has had a caching issue making it nearly impossible to properly test off consistently for about a year. With normal websites a refresh of a browser would be enough to get the latest non cached copy of a file, but with staging you need to re-name the file for the browser to see the latest version. This is why there is “news-46.css” file names. With the current setup the role of staging is flawed.
9. Domain issues
   1. There have been numerous issues around the domain from greater difficulty in troubleshooting issues or making fixes as it is on a separate domain.
10. Proxy issues
    1. The proxy blocks just about any site including TFS, doing deploys, etc.
11. Search
    1. Search has had numerous issues including not providing any search results and errors on subsequent searches. Search is the most valuable asset for an intranet due to the vast number of pages in the intranet and it helps associates find what they are looking for.

Custom Solutions

|  |  |  |
| --- | --- | --- |
| Solution | Notes |  |
| Insider | masterpage |  |
| Photo Gallery |  |  |
| Umpqua Life |  |  |
| News | Based on blog |  |
| Wows | Needs refactor |  |
| Umpqua Navigation | Uses term store |  |
| Dashboards | New one was under development |  |
| SAM | RSS Feed |  |
| Presidents Club |  |  |
| Org Chart | 3rd party |  |
| Associates Directory |  |  |
| Security Code |  |  |
| Stock Ticker |  |  |
| Connect Ticker | Flash |  |

# Solution Overview

[It’s critical that the solution overview ties back into the current challenges. If you state a challenge that will not be addressed by the solution you are proposing, be sure to call that out (we can’t boil the ocean … and somethings are not within our control). The Solution Overview should, at a minimum, highlight the work that will be done to resolve the challenges/issues. In some cases, you simply state “it will work” … help me understand what that means.

In addition, is there a migration plan for the content?]

We will build out a new Insider using 2015/2016 standards, best practices and technology. Features of the solution include:

1. Using Shareboot a SharePoint Bootstrap template
   1. Supports Responsive design:
      1. Scales to any device size including desktop, laptop, tablet, phone, etc.
   2. Clean modern look
   3. Uses Bootstrap, an industry standard
   4. Features are faster to develop with it.
   5. Template means there is a massive time savings and we can focus any UX/UI time on just making it better/customized how we see fit.
   6. Customize the template with company colors, logo, background and branding.
2. Structure
   1. Departments
      1. Each will have their own internal team site.
      2. Each department will have its own external facing subsite.
      3. Each department will have their own site with navigation on the side how it should be.
      4. An updated default departmental page layout will be provided that makes sense for each department.
      5. With the exception of HR, all department sites are hosted within one “Departments” subsite. This creates a scalability issue going forward.
3. Pages
   1. Home page:
      1. Humans rarely scroll down to see below the current view of browser, so key important elements will be visible on the home page. CTAs ( calls to action ) will be present for associates to click on the images/icons for various features such as SAM, Wows, etc. and take them to another page devoted to it. The primary focus element will be news, and the home page will be completely re-thought with a mandate of simple/clean/smart. In turn this will drastically reduce database/bandwidth/server resources by eliminating “feature clutter” on the home page.
      2. CTAs (calls to action) will be present for associates to click on the images/icons for various features such as SAM, Wow, etc. and take them to another page devoted to it.
      3. The primary focus element will be news.
      4. The home page will be completely re-thought with a mandate of simple/clean/smart.
      5. A few wireframe mockups will be offered.
4. Features
   1. Search will work correctly from the start and be more prominent. Search results will be improved using meta information. This will require cleanup by content managers. If folders are a popular organizational tool, it will take more time and effort to accomplish the cleanup.
   2. Org chart will utilize out of the box techniques, replacing the current 3rd party plugin.
   3. Connect Today will be rebuilt removing Flash.
5. Capabilities
   1. Targeting: targeting will be utilized.
   2. Initially Analytics will utilize SharePoint standard technology and will be replaced with Google Analytics for Phase 2.
6. Branding
   1. Simplicity: the human eye does not look at everything so the navigation, header, footer will prioritize important elements, not everything (there are other pages for them, and search will help out with this).
   2. Header to Footer will be completely re-built taking up less space and making good use of screen real-estate.
   3. Navigation will be re-structured to use standard SharePoint navigation. Taxonomy will play a hand in it with priority on associates to find what they are looking for.
7. Content Migration
   1. Content migration consists of moving existing relevant content; typically lists/document libraries and some pages. Since there will be a taxonomy re-org included, most landing pages for departments will be new and re-designed.
   2. Custom Solutions
      1. There is a more advanced migration tool available
         1. Is this an ACE question if they will purchase it?
      2. Many are WSPs but will need adjustments likely around CSS for widths, styles.
      3. InfoPath
         1. Ice Cream Truck Reservation System
      4. Workflows
         1. Most if not all are using K2
      5. -Do we have a tool selected for migration?   
          -How are the custom portions of the existing site getting migrated?   
          -Have we identified which custom solutions will need to be rebuilt (cannot be migrated)?  
          -Are there any InfoPath forms or SharePoint Designer workflows to migrate?
8. Responsiveness
   1. Phase 1 includes putting the foundation for responsiveness in place starting with the layout (header, navigation, footer).
   2. Phase 2 will address responsiveness all of the pages to be responsive as they are vast. We will see how they land and will determine then how responsive they are.
9. Managed Metadata
   1. Scope planning
   2. Plan terms and term sets
   3. Plan to share terminology and content types

This feature will continue to grow in popularity as Microsoft advocates using cross-site publishing to create a more flat site structure.

1. Business Connectivity Services planning

If our current farm uses BCS, we will need to plan for migration to the new farm. If not, it makes sense to configure our new farm to implement this feature for future large data needs.

1. Dependencies
   1. Shareboot template
   2. JQuery (updated)
   3. Bootstrap (updated)
   4. VideoJS (already used on news)
   5. Modernizer (better support to handle IE compatibility mode)
   6. CSSReset (makes all browsers behave more similarly)

**Tasks Breakdown**

1. Shareboot
   1. Purchase Shareboot template ( $199 )
   2. Install it
2. Definitions ( needed for some team member to understand what each feature is and how they are managed, or a tour )
   1. Define
      1. Wows
      2. SAM
      3. Culture Highlights
      4. Quicklinks
      5. Support
      6. Connect Today
      7. News
      8. Etc.
3. Wireframes
   1. Layout ( masterpage ) which for a dummy page which has the look throughout the entire site which includes header, navigation, footer.
   2. Pages
      1. Home
      2. Department
      3. Search
      4. Search Results
      5. Etc.
   3. Responsive
      1. Make responsive wire frames such as for tablets.
4. Template Work
   1. Change colors/fonts
   2. Add graphics/effects
   3. Customize the template such as with our company colors, logo, background
   4. Tweak the details to match the current Insider as best I can within the template’s specs
   5. Page Layouts
5. Infrastructure
   1. Capacity Planning
   2. Content Databases
   3. Site Collections
   4. Databases (will be moved to UMPQ domain)
6. Configuration
   1. Search configuration and search scopes
   2. Page Layouts
   3. Master Page
7. Content Migration

# Assumptions

[Have any of these assumptions been vetted with the teams you have dependencies on? If not, perhaps add a dependencies section and call them out. There’s a dependencies section within the Solution Overview, perhaps this can be broken out as its own section so that the dependencies are elevated.]

We will be using:

## New SharePoint environments

1. Prod
2. Staging
3. QA
4. Dev ( 3 already setup )
5. All using fresh base install of SharePoint
6. All environments on the same domain ( no test-domain )

## Supporting:

1. Compatibility for IE11+/Chrome
2. No support for IE7,IE8,EI9,IE10
3. Responsiveness for
   1. Desktops
   2. Laptops
   3. Tablets ( foundation support but not a priority, phase 2 )
   4. Phone ( foundation support but much less focus, not a priority, phase 2 )
   5. Other devices at various sizes as it will scale nicely

# Measures of Success

* Meet deadline
* All defined and agreed upon requirements are met
* New infrastructure provides a minimum of existing functionality to users (not less)
* New infrastructure corrects environment corruption
* Redesigned apps work better, have less or zero bugs, and are more maintainable
* Branding functions better, has zero bugs, and is more maintainable

# Tentative Milestones/Timelines

[I’d like to see more granular milestones and check-ins. The gap between 1/1/2016 and 3/31/2016 is scary! For example, when do you need to have the new SharePoint farm available to you in order to do everything you need to do before 3/31/2016?]

Our goal is for earlier dates.

|  |  |  |
| --- | --- | --- |
| Date | Item | Notes |
| December | Purchase shareboot | Completed |
| January | Definitions | Underway |
|  | Wireframes |  |
|  | Template work |  |
| February | Prototype ready |  |
|  | Infrastructure |  |
|  | Configuration |  |
| March 31st | Insider 3.0 goes live to all associates |  |

# Risks

One way I like to see Risks identified is in a table that also includes risk level and potential risk mitigation:

|  |  |  |
| --- | --- | --- |
| **Risk** | **Risk Level** | **Potential Mitigation** |
| Infrastructure availability by <insert drop dead date> | HIGH |  |
| Infrastructure availability | High |  |
| Resource constraints | High |  |
| Shareboot working as advertised. |  |  |
| IE backwards compatibility (always an issue) |  | Can reduce this risk by implementing a more limited set of functionality. The known issues are from overly-complex menu items. |

# Additional Benefits

1. Using a SharePoint Shareboot Bootstrap template
   * + - 1. Offers responsiveness

Scales to any device size including desktop, laptop, tablet, phone, etc.

* + - * 1. Clean modern look that humans are accustomed to
        2. Bootstrap is an industry standard and features are faster to develop with it.
        3. Using a template means there is a massive time savings and we can focus any UX/UI time on just making it better/customized how we see fit.
        4. Cleaner styles and consistency.

1. Structure
   * + - 1. Associates will be able to search and find results.
         2. Associates will navigate what they are looking for based off of taxonomy work that was done.
         3. Simplistic design is easy on the eyes.
         4. From home page re-design efforts there will be a significant reduction of database/bandwidth/server resources.
2. Targeting will be utilized.
3. Org chart utilizing out of the box techniques for this.
4. Analytical requirements will be applied
5. Taxonomical work that was done will be applied.

Through the results of this project it addresses many issues and also forward thinking. In addition the development, management, and maintenance efforts around SharePoint Insider intranet will be significantly reduced.

Our new insider 3.0 intranet will not only be fully functional but also very quick!

# Notes

Some notes along the way:

1. <http://www.nngroup.com/articles/intranet-design/>
2. Search: <https://www.youtube.com/watch?v=3cZGoJ2P1-g> , <https://www.youtube.com/watch?v=_e4CruO5D6c>

# Eye Candy

TODO: add cool graphics/images/wireframes?

Example Search Results