Web Team Delta: Phase 2 Action Plan

Timing Overview

- **Phase 2**: Mid-Nov to May 30th (library-wide pages)
- **Phase 3**: May- August 2015 (unit web pages; out of scope for this document)

Scope of Work

- Select and implement new content management system to replace OpenCMS
- Develop and implement user-centric content strategy and information architecture
  - reference CMS functional requirements and user experience-driven design process
- Assess, recommend and implement methods for content currently in custom databases or highly duplicative on site
  - faculty/staff/experts contact and descriptive information
  - Expand hours and loc’s to virtual libraries
  - Assess possibility to use custom content types in CMS (or alternate methods) for other DB’s.
  - Build capacity for widgets to embed information into unit pages (hours, libguides, faculty/staff info)
- Combine/revise/develop new **Library-wide** pages; put them into the new IA:
  - focus mainly on public information (e.g. LEARN website, ref resources, informational pages)
  - to a lesser extent staff website/resources such as Library IT, Policies, etc. (not including wikis).
  - No automated migration from existing CMS.
  - Unit pages out of scope for Phase 2 (unit page to be covered in Phase 3)
- End phase two, meet the following three objectives:
  - consensus for the content strategy moving forward
  - clear and limited number owners/maintainers for ‘central’ resources (based on RRSS hub model?)
  - attractive design, feature set, and AI to build support for library unit adoption.
Process Overview

1. **Nov 14**: Project starts in quiet phase

2. **Nov 30**: Chris sends message to Libnews
   a. Describes process and timeline

3. **Dec 15**: Follow up message to Libnews
   a. Asking people to clean up/delete pages in their direct area of responsibility.
   b. Clear that there will be no automated migration; discourage creation of new content.
   c. Freeze on new support from IT and new editors in existing CMS begin Jan 1; Final training session in ???

4. **Nov to mid-Jan**: Two teams develop (1) technical requirements and (2) functional requirements/content strategy/info architecture.
   a. Technical requirements process uses sandbox CMS (Drupal, Wordpress, Silverstripe)
   b. Functional requirements use input from four open sessions.

5. **Mid-Late January**: CMS ranking by small group (8-10 people max, with mix of technology, content, and admin)
   a. Initial ranking with rubric developed based on work under #3 above.
   b. Policy recommendations to CAPT ((Jan 15)
   c. Meetings with direct stakeholders to discuss the outcomes of the ranking process.
   d. CMS decision by product owner on or before Feb 1 or earlier if possible.

6. **Feb - May**:
   a. Mid-Jan to early March: CMS configuration and theming
   b. March - May: CMS Implementation January-March
   c. Training--specific details to be determined.
   d. Review and refine policies (users, etc) as warranted.

7. **May 30th (or earlier)**: Release date for new CMS and Phase two pages

Subteam/Process Grid
<table>
<thead>
<tr>
<th>Technical Subteam</th>
<th>Content Subteam*</th>
<th>Embedded Governance Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tasks</strong></td>
<td></td>
<td></td>
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<tr>
<td>Lists and describe backend technology requirements, e.g.:</td>
<td>Develops second and third level page architecture and page lists</td>
<td>• Assigning Content Owners (esp for second level page/RRSS Hub Model)</td>
</tr>
<tr>
<td>● security</td>
<td>● Conceptual IA Diagram</td>
<td>• quality control (web copy)</td>
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<tr>
<td>● customization</td>
<td>● Actual content from stub pages (content editing)</td>
<td>• change process/management</td>
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<tr>
<td>● staff training,</td>
<td>● coordinates content editing</td>
<td>• branding</td>
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<tr>
<td>● server</td>
<td>● Functional recommendations informing module selection</td>
<td>• communications</td>
</tr>
<tr>
<td>● migration planning, etc.</td>
<td>Develops short list of must &amp; like to have functions library staff need to complete using CMS, e.g.</td>
<td>• Compliance with new design</td>
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<tr>
<td>Install and test candidate CMSs:</td>
<td>● create slideshows from RSS,</td>
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<tr>
<td>● Technical testing</td>
<td>● create local nav menu, embed twitter</td>
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<td>● coordinate user testing</td>
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<tr>
<td>● Module/plug-in Selection</td>
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</tbody>
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<table>
<thead>
<tr>
<th>How and methods</th>
<th></th>
<th>Who is going to write/edit all the new/integrated content?</th>
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</thead>
<tbody>
<tr>
<td>● CMS research (Drupal/Wordpress/Sliverstripe)</td>
<td>● Content strategy training and process</td>
<td>To what extent do current content owners need to be consulted.</td>
</tr>
<tr>
<td>● Consult other libraries WI and UMICH</td>
<td>● Write User stories and action paths</td>
<td>Who is allowed to update?</td>
</tr>
<tr>
<td>● install CMS’s and do basic config</td>
<td>● Robert and Jen supply current page analysis data</td>
<td>Who is allowed to request an update?</td>
</tr>
<tr>
<td>● make available for user testing in sandbox mode</td>
<td>● Jemma and Maria supply wireframe markups for comment refinement</td>
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<td></td>
<td>● adaptations of current top page IA</td>
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</tbody>
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<thead>
<tr>
<th>Members</th>
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<th>CAPT and other stakeholder input on governance issues</th>
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</thead>
<tbody>
<tr>
<td>● Robert, William, Jemma, UX Librarian,</td>
<td>● Lisa Hinchliffe, Kirstin Dougan, Dan Tracy, Jen Chien-Yu, Kathleen Kern, Erin Kerby,</td>
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<td>Tim, Other IMS/WNS staff as needed</td>
<td>Heather Murphy,</td>
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<table>
<thead>
<tr>
<th>Key contact</th>
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<tbody>
<tr>
<td>● Robert -- infrastructure</td>
<td>● Chris - lead meetings</td>
<td></td>
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<tr>
<td>● William -- cms assessment</td>
<td>● Jemma and Maria - mockup and wireframing</td>
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<tr>
<td></td>
<td>● Jim Hahn -- app development</td>
<td>Chris</td>
</tr>
</tbody>
</table>
* Content subteam details

- Meet every week for ten weeks beginning Nov 14 (breaks excepted)
- Content strategy Workshop with Scott Kubie, Dec. 5
- Content subteam goal:
  - Analyze the pages, review them, decide which is best, (and will allow us to remove pages later, deal with whatever features are missing by bringing them into our framework.
  - Make recommendations re key features/functions that library staff need to complete using CMS → inform tech group application decisions.
- Suggested Process:
  a. Orient group in basic principles of content strategy/marketing; invite content strategist for training/workshop
  b. Next, develop consensus on our content strategy:
     ■ Look existing user stories/develop new users stories relating to second level pages
     ■ Robert provides list of pages from current CMS speaking to each need (baseline)
     ■ Rank pages from 1 (worthless/outdated) to 5 valuable/current
     ■ Determine what categories they SHOULD sort to
     ■ Draft user action labels that we can use on front page (e.g find a book),
     ■ Possibly emerge with X number of major areas to focus on, with key contact for each one
  c. At same time do survey and have open sessions to help develop functional requirements.
     ■ Personal invites to key people:
     ■ Have defined set of questions (focus group style)
     ■ have defined note taker, means writing everything down, not making a summary statement
     ■ members of tech and content team also attend; post session prioritization of feedback.
  d. Then, have them build recommendations for information architecture and functionality on results from steps b and c (short report due by Dec 22).
  e. Maria and Jemma draft wireframes using balsamiq and axure.
     ■ Include user experience element using wireframes
     ■ Content group provides feedback
     ■ Decision on templates/wireframes to use as starting point for implementation made by product owner, with input from content team and application subteam by Jan 12.

functional requirements--what do you as librarian need to do?
have them develop user stories--what do you users need to do?
Project Milestone and Task Overview

- **Phase 2 kick-off:** Nov 2014
- **Complete backend technology requirements:** Jan 2015
- **CMS selection/decision:** Feb 2015
- **Begin deployment:** Mar 2015
- **Finalize wireframes:** Apr 2015
- **Draft list for second/third level pages:** May 2015
- **Complete func req's list and IA diagram:** Jun 2015
- **Complete CMS ranking rubric:** Jul 2015
- **Configure and implement staging CMS:** Aug 2015
- **Develop func req's and IA:** Sep 2015
- **Implement and refine site IA:** Oct 2015
- **Write/edit/review content:** Nov 2015

- **Research CMS options:** Nov 2014 - Dec 2014
- **List CMS technical req's:** Dec 2014 - Jan 2015
- **Test CMS Options:** Jan 2015 - Feb 2015
- **Create/revie wireframes:** Feb 2015 - Mar 2015
- **Configure and implement staging CMS:** Mar 2015 - Apr 2015
- **Develop func req's and IA:** Apr 2015 - May 2015
- **Implement and refine site IA:** May 2015 - Jun 2015
- **Write/edit/review content:** Jun 2015 - Jul 2015