

Web Team Delta: Phase 2 Action Plan

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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

	Technical Subteam	Content Subteam*	Embedded Governance Issues
Tasks	<p>Lists and describe backend technology requirements, e.g.:</p> <ul style="list-style-type: none"> • security • customization, • staff training, • server • migration planning, etc. <p>Install and test candidate CMSs:</p> <ul style="list-style-type: none"> • Technical testing • coordinate user testing • Module/plug-in Selection 	<p>Develops second and third level page architecture and page lists</p> <ul style="list-style-type: none"> • Conceptual IA Diagram • Actual content from stub pages (content editing) • coordinates content editing • Functional recommendations informing module selection <p>Develops short list of must & like to have functions library staff need to complete using CMS, e.g.</p> <ul style="list-style-type: none"> • create slideshows from RSS, • create local nav menu, embed twitter 	<ul style="list-style-type: none"> • Assigning Content Owners (esp for second level page/RRSS Hub Model) • quality control (web copy) • change process/management • branding • communications • Compliance with new design
How and methods	<ul style="list-style-type: none"> • CMS research (Drupal/Wordpress/Sliverstripe) • Consult other libraries WI and UMICH • install CMS's and do basic config • make available for user testing in sandbox mode 	<ul style="list-style-type: none"> • Content strategy training and process • Write User stories and action paths • Robert and Jen supply current page analysis data • Jemma and Maria supply wireframe markups for comment refinement • adaptations of current top page IA 	<p>Who is going to write/edit all the new/integrated content?</p> <p>To what extent do current content owners need to be consulted.</p> <p>Who is allowed to update?</p> <p>Who is allowed to request an update?</p>
Members	<ul style="list-style-type: none"> • Robert, William, Jemma, UX Librarian, Tim, Other IMS/WNS staff as needed 	<ul style="list-style-type: none"> • Lisa Hinchliffe. Kirstin Dougan, Dan Tracy, Jen Chien-Yu, Kathleen Kern, Erin Kerby, Heather Murphy, 	<p>CAPT and other stakeholder input on governance issues</p>
Key contact	<ul style="list-style-type: none"> • Robert -- infrastructure • William -- cms assessment 	<ul style="list-style-type: none"> • Chris - lead meetings • Jemma and Maria - mockup and wireframing • Jim Hahn -- app development 	<p>Chris</p>

* 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

