

Intranet Workshop

Introductions

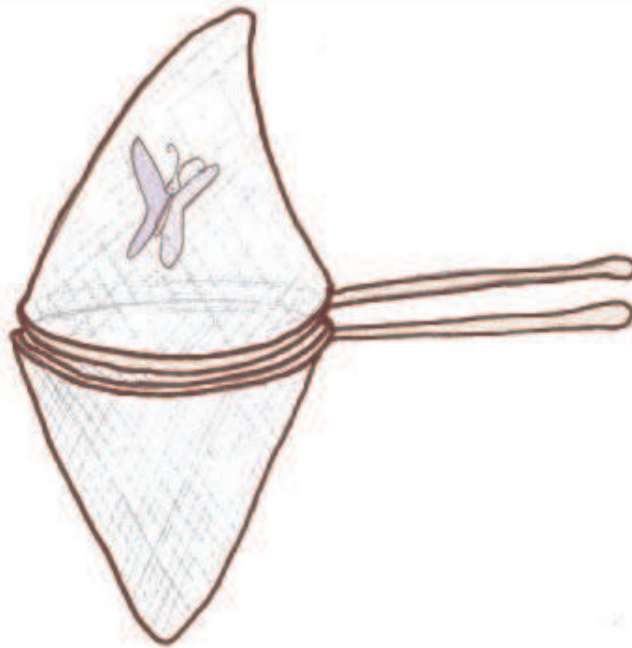
Workshop Overview

Interactive session to explore:

- What we mean by an Intranet
- Intranets and Knowledge Management
- Examples & practical organisational objectives
- Planning for a successful Intranet implementation
- Human Factors: psychology of information sharing
- Technology: how to stitch it all together
- Workshop Summary

What do we mean by “Intranet”

Meaning++



Intranet

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One Definition

“An intranet is a private network that is contained within an enterprise. It may consist of many interlinked local area networks and also use leased lines in the Wide Area Network.

Typically, an intranet includes connections through one or more gateway computers to the outside Internet.

The main purpose of an intranet is to share company information and computing resources among employees.

An intranet can also be used to facilitate working in groups and for teleconferences.”

[Web Services]

Another One

“A network based on TCP/IP protocols (an internet) belonging to an organization, usually a corporation, accessible only by the organization's members, employees, or others with authorization. An intranet's Web sites look and act just like any other Web sites, but the firewall surrounding an intranet fends off unauthorized access.

Like the Internet itself, intranets are used to share information. Secure intranets are now the fastest-growing segment of the Internet because they are much less expensive to build and manage than private networks based on proprietary protocols.” [Webopedia]

Is there a better definition

Our Definition

Knowledge Management

- Intranets are a tool for organisational Knowledge Management.
- Knowledge Management asserts that this is ***much*** more than just collecting and presenting information
 - Write down all the important things you know exercise (Chinese Imperial Civil Service exam)
 - Not enough time to do this but...
 - Just thinking how you do it is a good illustration of the principle that information needs **VALUE and CONTEXT**

Knowledge Management

Theory dictates that you critically review your organisation in terms of:

- The information assets it holds (value)
- Information flows and how knowledge is acquired and used (context)

The above will also involve examination of issues such as key knowledge brokers etc.

Full blown Knowledge Management exercises tend to turn into organisational change management proposals rather quickly with pressure to re-architect the organisation around it's knowledge centres.

Example

- This is all getting a little abstract so lets anchor it in an example
- Scenarios are not even vaguely accurate so try not to be distracted by their contrived nature, what is important is how Jane and the other players interact with the technology.

As we go through this, please try to make a note of concepts which would and (especially) wouldn't work in your organisation. We'll discuss these afterwards.

Example

It is 8:45 in the morning, Jane arrives at her desk in the Estate Services dept of South Borsetshire District Council. On her way in she notes that the Chief Officer's Assistant is already at her desk and in the middle of an animated phone call.

Jane has only been working at South Borsetshire for two months.

Her two colleagues are out of the office at various meetings with surveyors this morning, and she has a meeting mid morning with her boss, the Chief Officer.

She powers up her laptop and connects to the local wireless LAN. A new e-mail comes in from the Chief Officer's Assistant telling her that the meeting has been postponed as his son has broken his arm and he has had to take him to hospital.

Example

Jane logs in to the Intranet and, as she is now the most senior member of the team in the office, goes to the Estate Services area to check if there are any current issues. Almost immediately she notes that the reception staff have transcribed a number of messages left on the main answering machine from members of the public related to travellers moving on to an area of Ambridge Heath early this morning.

The Chief Executive and several councillors are now aware of the problem, and have called the department to ask what measures are being taken. These calls are taken by the assistant who tells the callers that the department is still assessing the situation and will update them shortly.

Having been with the department for a short period of time, Jane is not familiar with the land involved.

Example

She types in the search term “Ambridge Heath management” into the Intranet search engine and gets the following ranked results:

- Two matches from the Terrier GIS system with maps of the area.
- The most recent management agreement for an area of the heath
- 270 other results which aren't individually listed but categorised by type: 32 incidences of the search term in committee minutes, 120 in various classes of internal document
- There is also a note about a further 118 documents broken down by type which are categorised as sensitive and owned by other departments. Because the documents have this categorisation, Jane can see them in the index, but must refer to the owner on a case by case basis to have them unlocked for her access.

Example

From the low resolution maps and overlays, Jane can see that most of the area of Ambridge Heath is managed by South Borsetshire, and she recognises some of the landmarks, particularly the road access from messages taken earlier.

She also notes that parts of the area are designated SSSI.

The system offers her a large scale print out of the relevant areas to a local plotter. It would have recommended the A0 plotter in the department print room, but knows that it is offline awaiting an engineer visit, so instead offers the A2 plotter in the minor works office just down the corridor.

Jane confirms the print request and then moves on to collect more information about how to deal with the current situation.

Example

She saves the previous search results so that she can come back to them later, then opens up a new search:

“Unauthorised Traveller Encampments Policy”

The Intranet search engine offers her one primary result:

“South Borsetshire Policy and Procedures for Unauthorised Traveller Encampments”

It also lists 207 other documents categorised according to type, period and context, but doesn't actually list all of these individually.

She clicks on the primary link, and a well structured native HTML document opens up at the Contents page. From the introduction, she recognises that this is the document that describes the steps she must now take.

Example

Whilst navigating around the document, she notices a “note” icon in the top left of the page. Clicking on it she finds a document which has been attached to the policy by a Senior Estates Officer after the post-mortem from a previous incident. It is a note saying one of their conclusions was that a simple check-list & flow chart summary card of actions to be taken, roles and responsibilities would have been helpful and that the team prepared one. It has been approved for inclusion in the next revision of the document when it goes to committee, but is attached here for reference.

Jane finds the checklist & flowchart enormously helpful as it summarises the actions she has already read in the document overview.

Reading these, it becomes clear that one of the first actions is for the Chief Estates Officer (or most senior estates officer present) to assemble a team to deal with the incident.

Example

As she starts to think about what she needs to do next, a call is put through from Inspector Adams of the Dorsetshire Constabulary. He reports that his men have reacted to temporarily block the access road to the Heath with their vehicles to prevent further trespass, but needs to know what action the Authority plans to take next. He will shortly be returning to headquarters and is available to come into the offices for an emergency meeting on his way in 35 minutes at 10am.

In the absence of more senior staff Jane realises that she must put together and chair a team to deal with this, and that she needs to get everyone together for an initial meeting, probably to coincide with Inspector Adams availability at 10am.

Before she does this, she decides she needs to ensure that the Chief Officer is at least informed of developments as soon as he becomes contactable. His assistant has already left a voicemail asking him to call the office but understandably he has not received this yet.

Example

Jane goes to the key contacts panel of her personal Intranet page and clicks on the link for her boss. She clicks the “text message” link and types a short message which is then immediately sent to his mobile phone. His phone will probably be switched off as he is within a hospital building but she has at least taken every step to ensure that he is informed at the earliest possible opportunity.

Jane now has 30mins to assemble a team and chair it's first meeting!

From the flowchart and policy she knows that she needs the following specialists:

- Legal Services
- Contract Services
- Communications

Example

She goes to the main “Contact Search” area of the Intranet and fills in the “Advanced Contact Search” form:

Department: **Legal Services** Role: **Legal Officer or above**

Experience: **Travelers, Trespass** Availability: **10am-12am 1/4/04**

She gets the following results:

Bob Anderson – 2 tasks/projects in last 24 months involving keywords “travellers or trespass”, 1 involving both (click for details).

Status: currently at his desk and logged on, available at 10am.

Sheila Jones – 7 tasks/projects in last 24 months involving keywords “travellers or trespass”, 4 involving both, 6 as department lead (click for details).

Status: currently working from home on a contract draft, has requested “Please avoid calling 1/4/04”

Example

Jane clicks on the “request attendance” checkbox next to Bob's name, and clicks on the “Cc: meeting information by e-mail” next to Sheila's entry as she wants her to be aware of the situation and the context.

She repeats the process for the other specialists needed.

In the meeting information panel, she types a short paragraph describing the reason for the meeting, and clicks to add links to the maps, policy document, flowchart, and all of the messages currently received on the subject. Because the latter area is only normally accessible from within the Estates department, she is prompted to unlock the specified messages for the recipients only.

She sets the priority to “2”, this is actually a very high priority, second only to a major incident response. The Intranet chooses a suitable free meeting room and elects to send requests by e-mail, SMS, and automated voice call due to the priority and short notice of the meeting.

Example

With 25 mins now before she needs to attend the team meeting, and mindful that various parties need to be informed about progress on the issue, Jane decides to put an issue update onto the news area of the Intranet.

She goes to her home page and selects “New news article” with a priority of “highest”. She enters the title “Traveller Camp on Ambridge Heath”, and additional keywords: “Trespass, incident, response, B2629”.

Selecting options to make the item *transient, time-sensitive, public-content: partial*, she types in a simple two paragraph summary of the information and actions taken so far, and then highlights these and the title and marks them “public disclosure”.

She then pastes a reference to the more detailed information composed for the team meeting into the item complete with the links.

Example

This more confidential information (messages etc) are marked as “sensitive” which means that intranet users from other departments will not be shown those items or references to them.

By adding several key parties to the “inform” area of the item, she ensures these individuals will be informed by e-mail about the news item.

Her role is authorised to create new news items directly without senior approval so the item is immediately linked to the department home page and meta-data added to the search engine. It is also queued for adding to the main news panel of the Intranet home page after approval.

Because it contains information marked as public, notification will be sent to the communication office who will review the public content and promote it to the public Internet site if appropriate.

Example

Jane now has 15 minutes before the meeting, just enough time to read through the policy notes once more, then pick up the map plot on her way to the meeting room. She may even get time for a coffee at this rate!

Which bits of this example did you think would work in your organisation?

Objectives for Intranet Deployment

- Let's make a list...

Some Objectives

- Organisational Structure
 - Improve communication of organisational values and strategy
 - Improve bottom-up communication
 - Enable wider analysis of operational data and results
- Improve use of existing knowledge
 - Map expertise of employees
 - Provide mechanism to search for previously developed formal knowledge
 - Identify intangible assets

Some Objectives

- Improve Collaboration
 - Foster cross functional collaboration
 - Enable geographical collaboration
 - Develop "interest communities"
- Personnel related
 - Improve hiring & internal applicant process
 - Facilitate functional mobility of employees
 - Improve induction process
 - Reduce training costs and or improve availability
 - Facilitate teleworkers
 - Increase non work related interaction between employees

Some Objectives

- Increase workflow efficiency of specific processes
 - Improve information exchange with external clients
 - Reduce client service costs
 - Generate better external messaging
 - Capture/process client information more efficiently

Implementation

Planning

- Decide on organisational objectives that your Intranet needs to support
- Look at existing and desired information flow in your organisation with respect to the objectives
- Identify key knowledge acquisition points, knowledge brokers and consumers with respect to those information flows
- From these, derive key content and workflows
- Assess organisational impact of automating collection, processing, and propagation of information

“If you build it they will come”

- voice to Ray Kinsella (Kevin Costner) in the film “Field of Dreams” [1989]

Conveniently timed just before the start of the mass access Internet era, the above phrase reinforced by early success stories like Yahoo became the byword for Internet information services.

Is it sufficient to simply provide the tools and expect users (with training etc) to make effective use of them to share information with each other?

Psychology of Information Sharing

- People just don't "give away" information, it's usually done as part of a bargain:
 - Recognition and respect

“You are recognising my power by asking me for information, and I will gain respect by giving it to you, I expect attribution of the information because it is still my information.”
 - Explicit Reciprocal Bargain

“I am only doing this because I expect to get information of equal or greater value from you in future”
 - Combinatorial Value

“I know that this information has value for me if exploited, and it needs others, or the skills of others to exploit it”

Creating a Positive Sharing Bargain

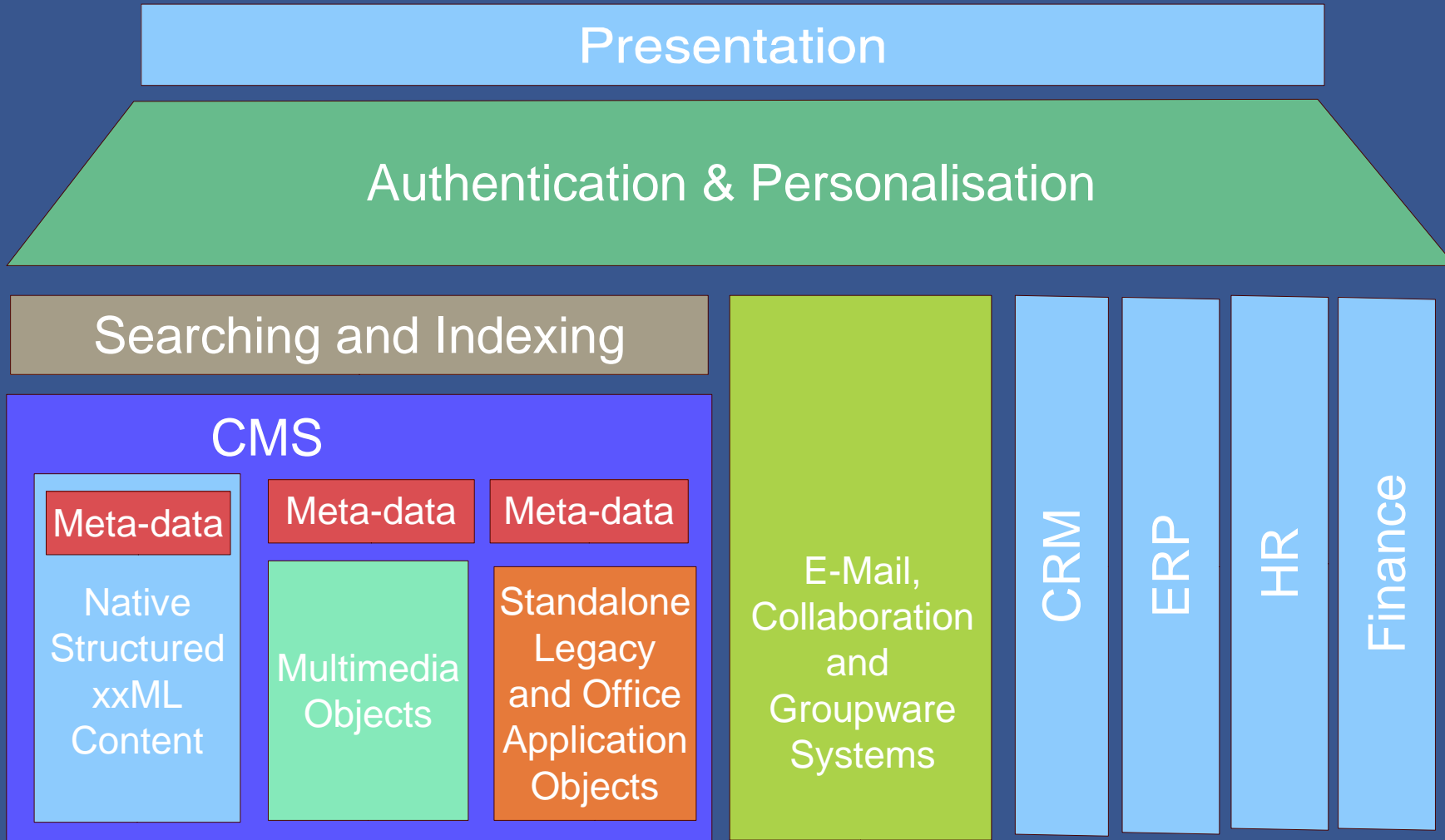
How would you encourage Intranet adoption in the form of good quality and coverage of content within your organisation?

Suggestions:

- Measure Knowledge production just like any other kind of activity
- Record quantity and more importantly quality of Intranet knowledge contribution
 - Use access information to measure access stats and session length
 - Use post content surveys to rate content and provide feedback: “was this document helpful”

Technology

Block Diagram



Content Management Systems

How do you provide for wide availability of authoring tools and a structured framework for content?

Answer covers everything from a few dozen copies of an HTML editing package with a fileshare and templates to a £1m++ content management framework. Results aren't always proportional to investment!

Difference is generally:

- Versioning
- Security
- Collaboration
- Workflow
- Personalisation etc

Content Management

CMS Questions:

- Who will be actually providing content in your organisation?
- What kind of skills will they possess
- What kind of content (text, graphics, audio, video)?
- Will there be a formal workflow and approval process?
- What kind of access control and personalisation will be required for content consumers?
- Is automated re-purposing of content required (Desktop HTML, PDA, WAP etc)
- How will meta-data be managed and generated (by content authors, or using a formal framework by CMS).

Meta-data, Searching, Indexing, and Categorisation

- This is ***THE*** crucial factor in Intranet information systems
- In our example Jane wouldn't have been able to do anything if she couldn't find the information **quickly**
- Internet examples show value of useable search and cataloguing tools:
 - Yahoo - first significant directory
 - AltaVista - first even vaguely inclusive search engine
 - Google - first search engine to assign context and value to results, now a part of the English language.
- Searching and Indexing is “easier” on an Intranet because we can set and enforce standards for meta-data.

Integrating Information Sources

Legacy Sources:

- Explore ways of getting into repurposeable format:
 - XML, HTML, readable ASCII, CSV (data), ps, or pdf
 - Avoid propagating proprietary data formats
 - Integrate acquisition with publishing workflow
 - Don't be afraid of pragmatic (cheap, simple) solutions

Non Text/Data Information

Graphics/Audio/Video etc:

- If your architecture is right then these will fit seamlessly, but there are some special considerations:
 - These “opaque binary” objects typically contain little or no machine readable context information. Good quality meta-data is therefore crucial if you are ever going to locate them in searches etc.
 - Machine storage and archiving requirements can be several orders of magnitude more onerous (=expensive) than text/data based objects – need to understand and plan/budget for this before implementation
- Presentation needs to be planned to take into account users of non audio/video capable access devices

Summary/Action Plan

1) Agree objectives

- Relate goals to workflow of organisation
- Avoid sharing information “because it exists”
- Target instead facilitating key organisational tasks/objectives by sharing structured knowledge

2) Assess organisational implications

3) Drive from an appropriate part of the organisation

- A non-trivial Intranet is a knowledge management project
- IT or personnel are not necessarily the best places to drive organisation wide knowledge management projects

Summary

- 4) Identify and involve knowledge brokers
- 5) Plan recognition and reward framework for contributors
 - Design this in from the start
- 6) Select appropriate IT tools to accomplish objectives
 - Simplest possible implementation with open interoperable tools often work better than high risk “big bang” implementation of enormous proprietary systems.

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Workshop Materials:

- Add name and e-mail address to sheet circulating, and I will e-mail presentation.
- Other reference material – see resource sheet, or <http://www.rpanetwork.co.uk/intranet/>