

UBC IT Intranet Redesign Needs Analysis & Personas

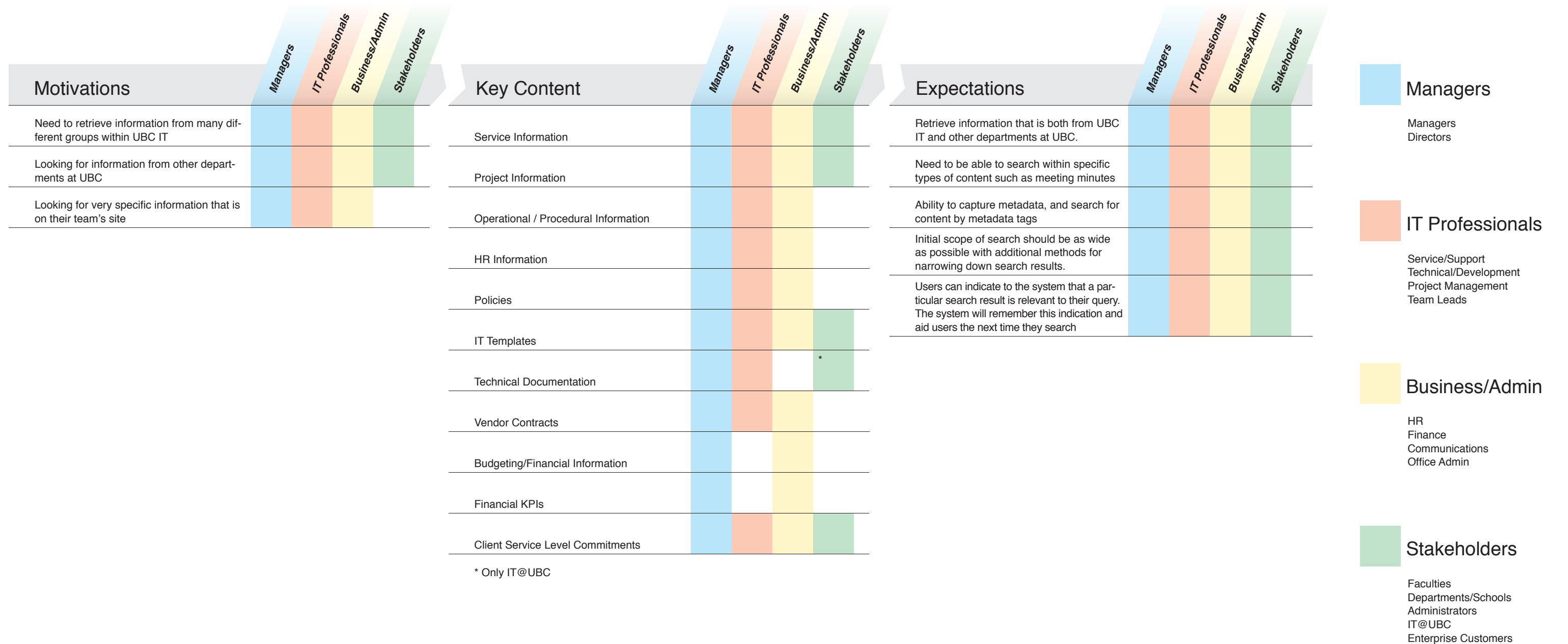


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October 8th, 2010

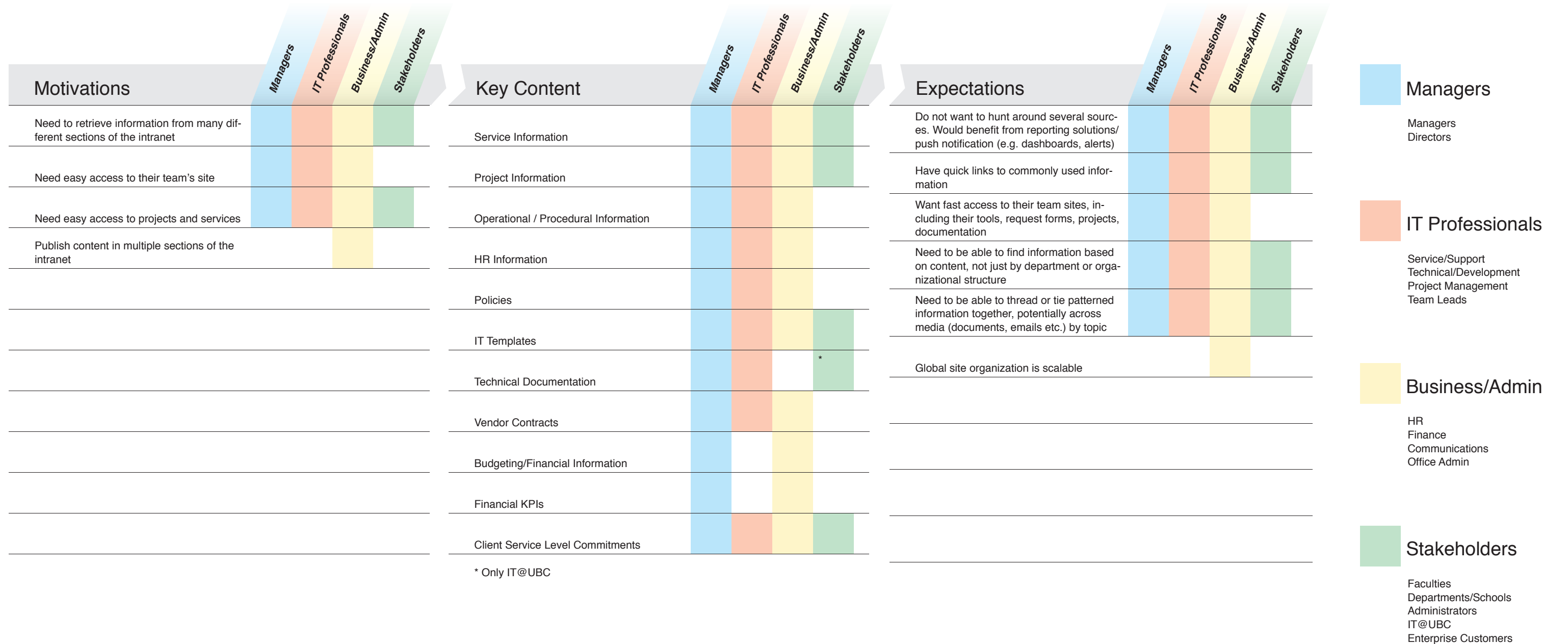
Jessica Dill
jessica@analyticdesigngroup.com



* Only IT@UBC

- Managers**
 - Managers
 - Directors
- IT Professionals**
 - Service/Support
 - Technical/Development
 - Project Management
 - Team Leads
- Business/Admin**
 - HR
 - Finance
 - Communications
 - Office Admin
- Stakeholders**
 - Faculties
 - Departments/Schools
 - Administrators
 - IT@UBC
 - Enterprise Customers

Note: All audiences include both full time and term employees.

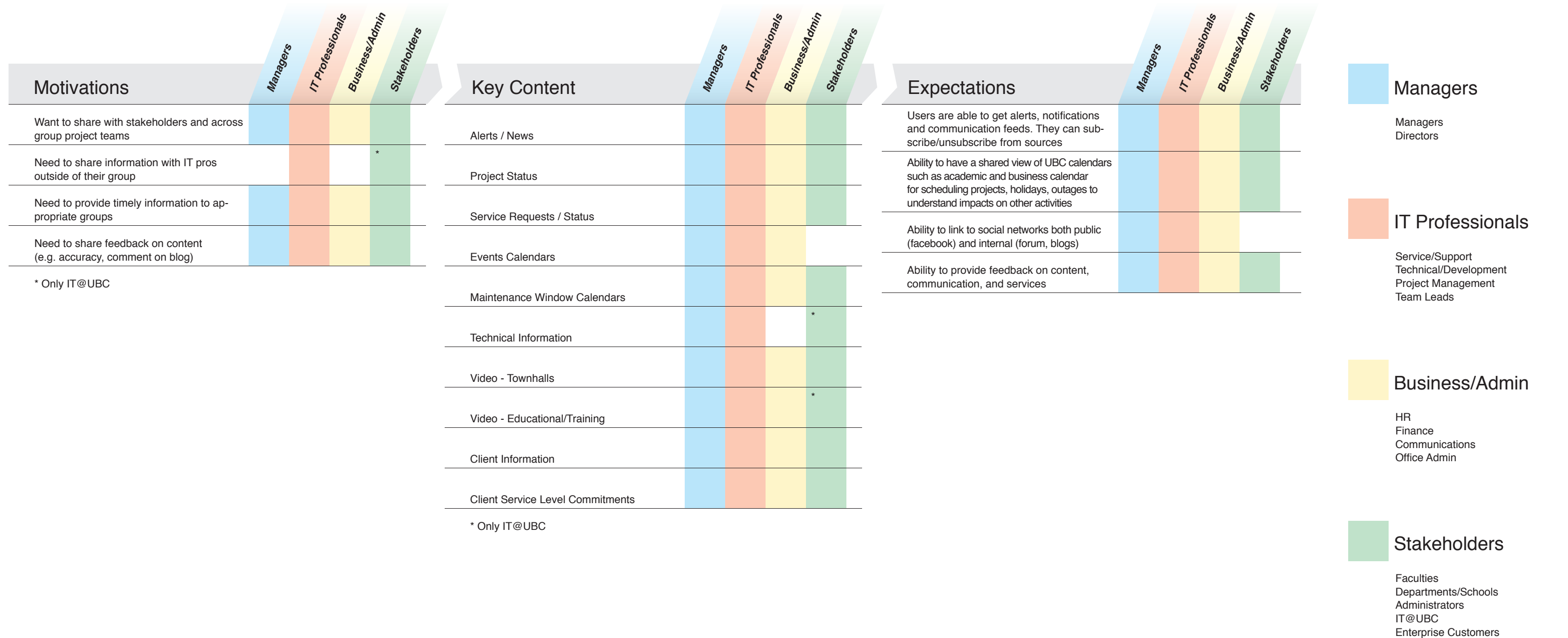


Note: All audiences include both full time and term employees.

Motivations	Managers	IT Professionals	Business/Admin	Stakeholders	Key Content	Managers	IT Professionals	Business/Admin	Stakeholders	Expectations	Managers	IT Professionals	Business/Admin	Stakeholders
To understand what new technologies and services are being introduced by UBC IT	■	■	■	■	Project Overview	■	■	■	■	See a list of all projects with high-level project information	■	■	■	■
Visibility into projects to ensure that duplicate efforts aren't happening	■	■	■	■	High Level Project Status	■	■	■	■	The ability to filter a projects list by different parameters such as topic, project status or team name	■	■	■	■
To get details about an active project that they are working on or a project they were assigned to in the past	■	■	■	■	All Project Schedules/Resourcing	■	■	■	■	Ability to see "their" projects, past and current (quick access to current)	■	■	■	■
To learn what and how projects/initiatives will affect their department	■	■	■	■	All Project Tasks/Milestones/Issues	■	■	■	■	Regular information updates on initiatives (new, updated, cancelled etc – "status" possibly through a subscription or maybe a dashboard)	■	■	■	■
					Project Templates	■	■	■	■					
					Detailed project Information for project team members	■	■	■	■					

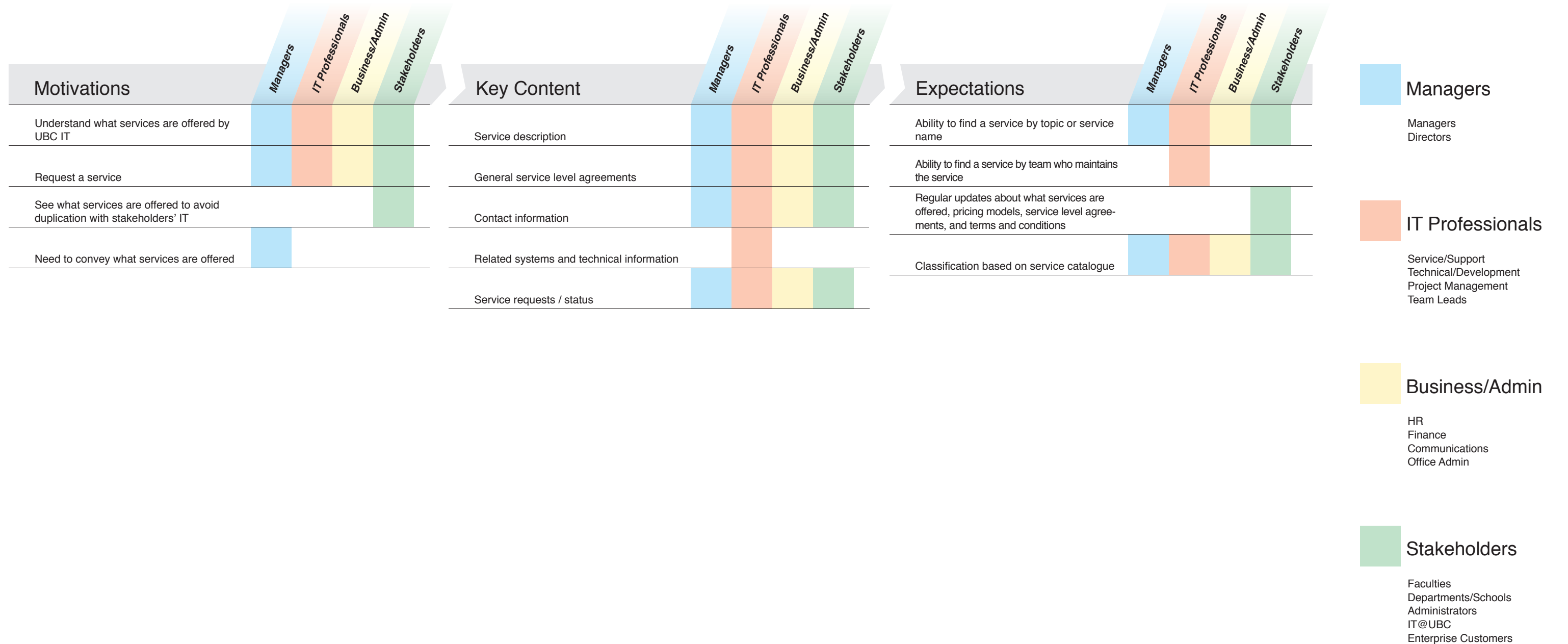
- **Managers**
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 Directors
- **IT Professionals**
 Service/Support
 Technical/Development
 Project Management
 Team Leads
- **Business/Admin**
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- **Stakeholders**
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Note: All audiences include both full time and term employees.



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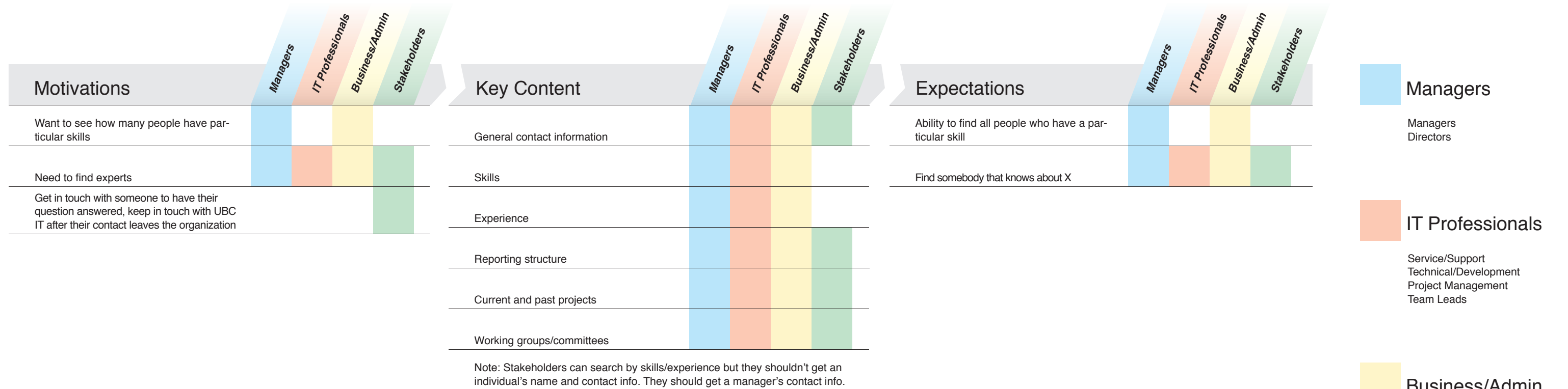
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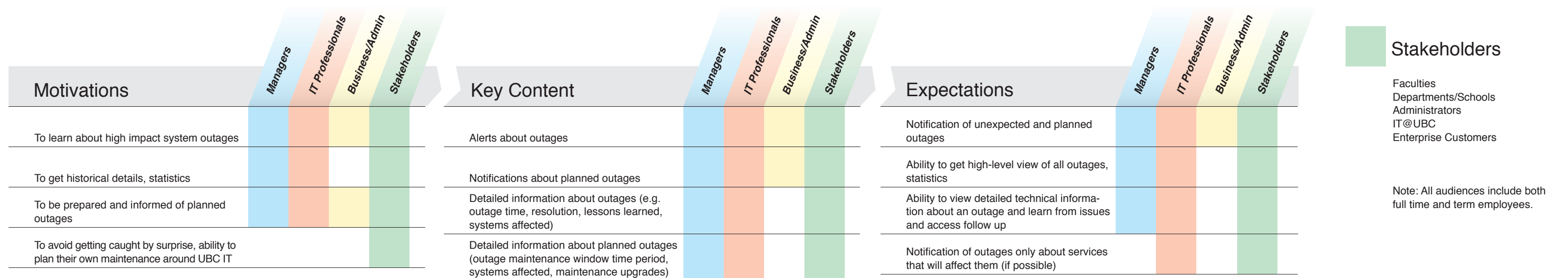
Find People Based on Skills

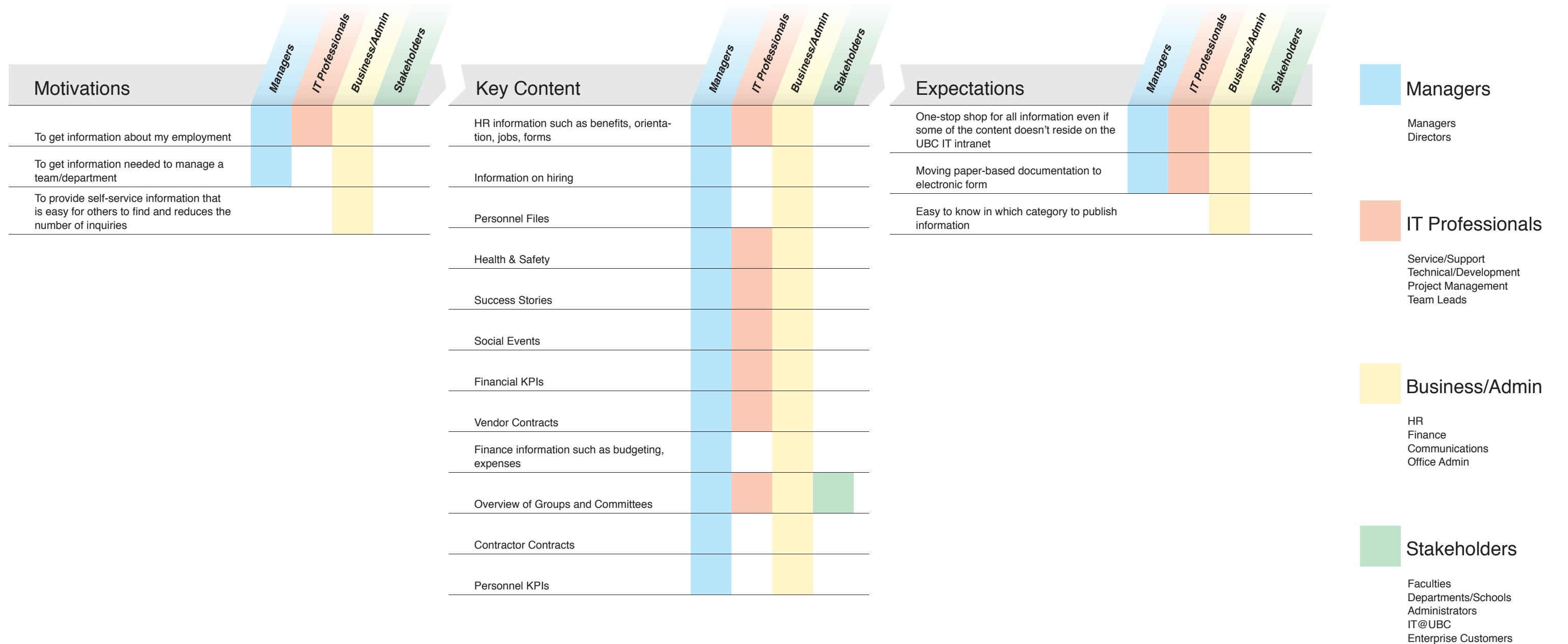
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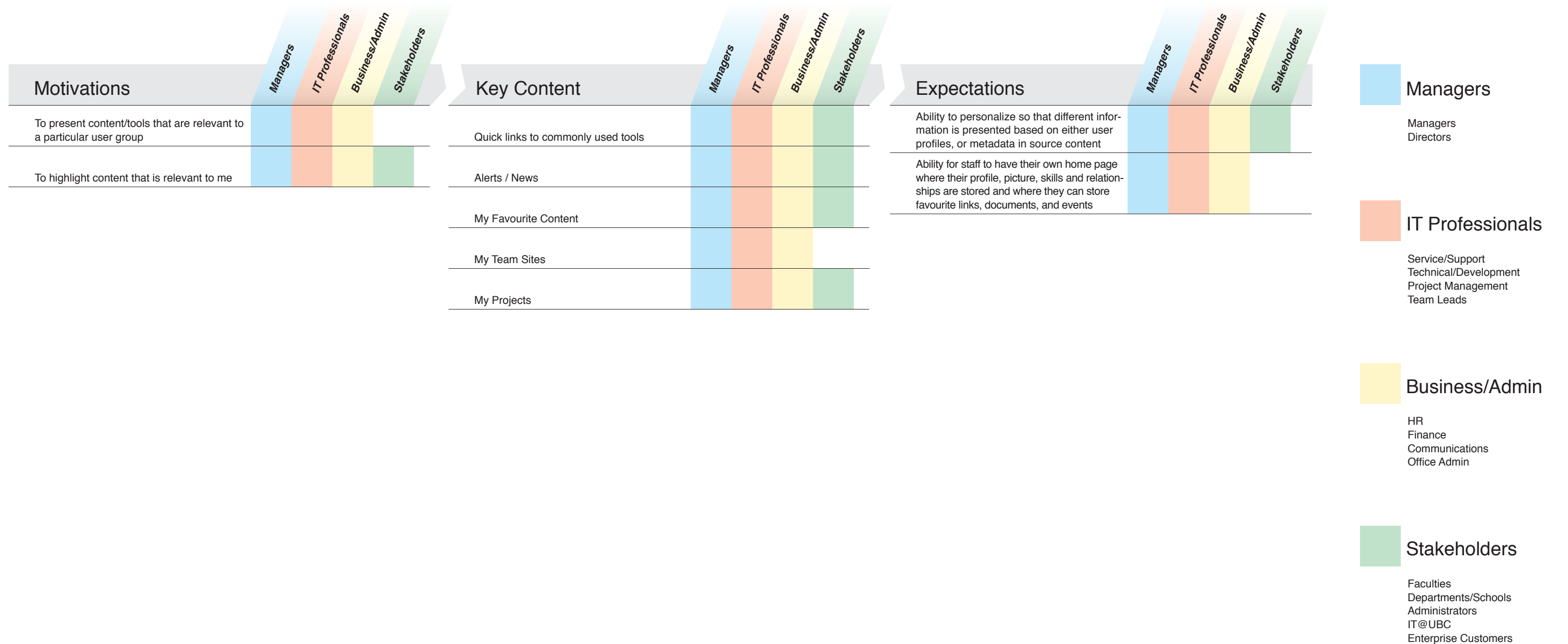
Need Information about Outages

#7





Note: All audiences include both full time and term employees.



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Margaret Campbell

Margaret has been working at UBC IT for 8 years, the last 2 years as a manager of her department. She has worked in the IT industry for her entire career in both the private and public sectors. She strongly believes in a customer-oriented approach to providing IT services and wants her department to focus on excellent customer service as well as innovative technical development.

She often needs to get information from the intranet and wants a tool that allows her to easily find information about projects, services, and people, allows her to collaborate with members of her working groups, and provides information and tools to help her manage her department.

“I want a site that provides one-stop shopping with easy access to all my content and tools.”

Key Content

- Budgeting/Financial Information
- Client Information
 - Client Service Level Commitments
- Contractor Contracts
- Events Calendars
- Financial KPIs
- Groups and Committees Overview
- Health & Safety
- HR Information
 - Benefits, orientation, jobs, forms
 - Information on hiring
 - Personnel Files
- IT Templates
- Maintenance Window Calendars
- News
- Operational / Procedural Information
- Outages
 - Alerts about outages
 - Notifications about planned outages
 - Detailed information about outages
 - Detailed information about planned outages
- People / Contact Information
 - General contact information
 - Skills
 - Experience
 - Reporting Structure
 - Current & Past Projects
 - Working Groups / Committees
- Personnel KPIs
- Policies
- Project Information
 - Project Overview
 - High Level Project Status
 - All Project Schedules/Resourcing
 - All Project Tasks/Milestones/Issues
 - Project Templates
 - Detailed project Information for project team members
- Quick links to commonly used tools
 - My Favourite Content
 - My Team Sites
 - My Projects
- Service Information
 - Service description
 - General Service Level Agreements
 - Contact information
 - Service requests / status
- Social Events
- Success Stories
- Technical Documentation
- Vendor Contracts
- Video - Town Hall Meetings
- Video - Educational/Training

NEEDS

MOTIVATIONS

EXPECTATIONS (FEATURES)

Findability (Search, Navigation)

- Need to retrieve information from many different groups within UBC IT
- Looking for information from other departments at UBC
- Looking for very specific information that is on their team's site
- Need easy access to projects and services

- Retrieve information that is both from UBC IT and other departments at UBC
- Need to be able to search within specific types of content such as meeting minutes
- Ability to capture metadata, and search for content by metadata tags
- Initial scope of search should be as wide as possible with additional methods for narrowing down search results
- Users can indicate to the system that a particular search result is relevant to their query. The system will remember this indication and aid users the next time they search
- Do not want to hunt around several sources. Would benefit from reporting solutions/ push notification (e.g. dashboards, alerts)
- Have quick links to commonly used information
- Want fast access to their team sites, including their tools, request forms, projects, documentation
- Need to be able to find information based on content, not just by department or organizational structure
- Need to be able to thread or tie patterned information together, potentially across media (documents, emails etc.) by topic

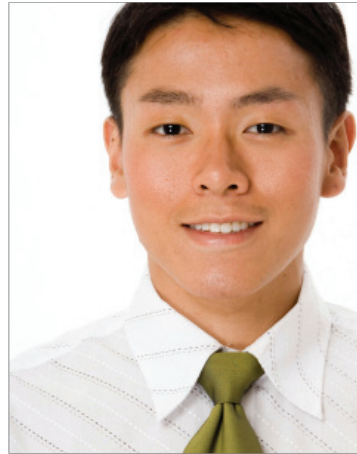
Project Information

- To understand what new technologies and services are being introduced by UBC IT
- Visibility into projects to ensure that duplicate efforts aren't happening
- To get details about an active project that they are working on or a project they were assigned to in the past
- To learn what and how projects/initiatives will affect their department

- See a list of all projects with high-level project information
- The ability to filter a projects list by different parameters such as topic, project status or team name
- Ability to see "their" projects, past and current (quick access to current)
- Regular information updates on initiatives (new, updated, cancelled etc – "status" possibly through a subscription or maybe a dashboard)

Managers (continued)

NEEDS	MOTIVATIONS	EXPECTATIONS (FEATURES)
Collaboration & Sharing	<ul style="list-style-type: none"> • Want to share with stakeholders and across group project teams • Need to provide timely information to appropriate groups • Need to share feedback on content (e.g. accuracy, comment on blog) 	<ul style="list-style-type: none"> • Users are able to get alerts, notifications and communication feeds. They can subscribe/unsubscribe from sources • Ability to have a shared view of UBC calendars such as academic and business calendar for scheduling projects, holidays, outages to understand impacts on other activities • Ability to link to social networks both public (facebook) and internal (forum, blogs) • Ability to provide feedback on content, communication, and services
Services	<ul style="list-style-type: none"> • Understand what services are offered by UBC IT • Request a service • Need to convey what services are offered 	<ul style="list-style-type: none"> • Ability to find a service by topic or service name • Classification based on service catalogue
People & Skills	<ul style="list-style-type: none"> • Want to see how many people have particular skills • Need to find experts 	<ul style="list-style-type: none"> • Ability to find all people who have a particular skill • Find somebody that knows about X
Outages	<ul style="list-style-type: none"> • To learn about high-impact system outages • To get historical details, statistics • To be prepared and informed of planned outages 	<ul style="list-style-type: none"> • Notification of unexpected and planned outages • Ability to get high-level view of all outages, statistics • Ability to view detailed technical information about an outage and learn from issues and access follow up
HR & Finance Information	<ul style="list-style-type: none"> • To get information about my employment • To get information needed to manage a team/department 	<ul style="list-style-type: none"> • One-stop shop for all information even if some of the content doesn't reside on the UBC IT intranet • Moving paper-based documentation to electronic form
Personalization	<ul style="list-style-type: none"> • To present content/tools that are relevant to a particular user group • To highlight content that is relevant to me 	<ul style="list-style-type: none"> • Ability to personalize so that different information is presented based on either user profiles, or metadata in source content • Ability for staff to have their own home page where their profile, picture, skills and relationships are stored and where they can store favourite links, documents, and events



Roger Lee

Roger has been with UBC IT for 3 years working as a technical analyst. Previously, he worked in IT departments in large corporations but decided to move to a university setting because he thought he'd get a chance to work with a wider range of technologies.

He goes to the intranet to access his team site and looks at his team's technical documentation. He wants an easy way to find (either by searching or browsing) technical documentation by topic, as well as quick access to the projects he works on and the tools he frequently accesses.

“I want to find technical documentation quickly – I need a powerful search that works.”

Key Content

- Client Information
 - Client Service Level Commitments
- Events Calendars
- Groups and Committees Overview
- Health & Safety
- HR Information
 - Benefits, orientation, jobs, forms
- IT Templates
- Maintenance Window Calendars
- News
- Operational / Procedural Information
- Outages
 - Alerts about outages
 - Notifications about planned outages
 - Detailed information about outages
 - Detailed information about planned outages
- People / Contact Information
 - General contact information
 - Skills
 - Experience
 - Reporting Structure
 - Current & Past Projects
 - Working Groups / Committees
- Policies
- Project Information
 - Project Overview
 - High Level Project Status
 - All Project Schedules/Resourcing
 - All Project Tasks/Milestones/Issues
 - Project Templates
 - Detailed project information for project team members
- Quick links to commonly used tools
 - My Favourite Content
 - My Team Sites
 - My Projects
- Service Information
 - Service description
 - General service level agreements
 - Contact information
 - Related systems and technical information
 - Service requests / status
- Social Events
- Success Stories
- Technical Documentation
- Vendor Contracts
- Video - Town Hall Meetings
- Video - Educational/Training

NEEDS

MOTIVATIONS

EXPECTATIONS (FEATURES)

Findability (Search, Navigation)

- Need to retrieve information from many different groups within UBC IT
- Looking for information from other departments at UBC
- Looking for very specific information that is on their team's site
- Need easy access to projects and services

- Retrieve information that is both from UBC IT and other departments at UBC
- Need to be able to search within specific types of content such as meeting minutes
- Ability to capture metadata, and search for content by metadata tags
- Initial scope of search should be as wide as possible with additional methods for narrowing down search results
- Users can indicate to the system that a particular search result is relevant to their query. The system will remember this indication and aid users the next time they search
- Do not want to hunt around several sources. Would benefit from reporting solutions/ push notification (e.g. dashboards, alerts)
- Have quick links to commonly used information
- Want fast access to their team sites, including their tools, request forms, projects, documentation
- Need to be able to find information based on content, not just by department or organizational structure
- Need to be able to thread or tie patterned information together, potentially across media (documents, emails etc.) by topic

Project Information

- To understand what new technologies and services are being introduced by UBC IT
- Visibility into projects to ensure that duplicate efforts aren't happening
- To get details about an active project that they are working on or a project they were assigned to in the past
- To learn what and how projects/initiatives will affect their department

- See a list of all projects with high-level project information
- The ability to filter a projects list by different parameters such as topic, project status or team name
- Ability to see "their" projects, past and current (quick access to current)
- Regular information updates on initiatives (new, updated, cancelled etc – "status" possibly through a subscription or maybe a dashboard)

NEEDS	MOTIVATIONS	EXPECTATIONS (FEATURES)
<p>Collaboration & Sharing</p>	<ul style="list-style-type: none"> • Want to share with stakeholders and across group project teams • Need to share information with IT pros outside of their group • Need to provide timely information to appropriate groups • Need to share feedback on content (e.g. accuracy, comment on blog) 	<ul style="list-style-type: none"> • Users are able to get alerts, notifications and communication feeds. They can subscribe/ and unsubscribe from sources • Ability to have a shared view of UBC calendars such as academic and business calendar for scheduling projects, holidays, outages to understand impacts on other activities • Ability to link to social networks both public (facebook) and internal (forum, blogs) • Ability to provide feedback on content, communication, and services
<p>Services</p>	<ul style="list-style-type: none"> • Understand what services are offered by UBC IT • Request a service 	<ul style="list-style-type: none"> • Ability to find a service by topic or service name • Ability to find a service by team who maintains the service • Classification based on service catalogue
<p>People & Skills</p>	<ul style="list-style-type: none"> • Need to find experts 	<ul style="list-style-type: none"> • Find somebody that knows about X
<p>Outages</p>	<ul style="list-style-type: none"> • To learn about high-impact system outages • To get historical details, statistics • To be prepared and informed of planned outages 	<ul style="list-style-type: none"> • Notification of unexpected and planned outages • Ability to get high-level view of all outages, statistics • Ability to view detailed technical information about an outage and learn from issues and access follow up • Notification of outages only about services that will affect them (if possible)
<p>HR & Finance Information</p>	<ul style="list-style-type: none"> • To get information about my employment 	<ul style="list-style-type: none"> • One-stop shop for all information even if some of the content doesn't reside on the UBC IT intranet • Moving paper-based documentation to electronic form
<p>Personalization</p>	<ul style="list-style-type: none"> • To present content/tools that are relevant to a particular user group • To highlight content that is relevant to me 	<ul style="list-style-type: none"> • Ability to personalize so that different information is presented based on either user profiles, or metadata in source content • Ability for staff to have their own home page where their profile, picture, skills and relationships are stored and where they can store favourite links, documents, and events



Joan Lancaster

Joan has been the office manager at UBC IT for 4 years. Previously, she worked in the Faculty of Arts and the Faculty of Medicine at UBC. She's always worked in an academic setting and understands how universities work and how to navigate university bureaucracy.

Joan publishes a lot of information to the intranet that should be readily accessible to all employees. She wants to have clear categories so she knows exactly where to publish content. She also wants easy ways to notify people that content has been added or updated.

“I often need to email people a link to content on the intranet. It would be nice if I could easily alert people instead of copying these long URLs into an email.”

Key Content

- Budgeting/Financial Information
- Client Information
 - Client Service Level Commitments
- Contractor Contracts
- Events Calendars
- Financial KPIs
- Groups and Committees Overview
- Health & Safety
- HR Information
 - Benefits, orientation, jobs, forms
 - Information on hiring
 - Personnel Files
- IT Templates
- Maintenance Window Calendars
- News
- Operational / Procedural Information
- Outages
 - Alerts about outages
 - Notifications about planned outages
- People / Contact Information
 - General contact information
 - Skills
 - Experience
 - Reporting Structure
 - Current & Past Projects
 - Working Groups / Committees
- Personnel KPIs
- Policies
- Project Information
 - Project Overview
 - High Level Project Status
 - All Project Schedules/Resourcing
 - Project Templates
 - Detailed project information for project team members
- Quick links to commonly used tools
 - My Favourite Content
 - My Team Sites
 - My Projects
- Service Information
 - Service description
 - General service level agreements
 - Contact information
 - Service requests / status
- Social Events
- Success Stories
- Vendor Contracts
- Video - Town Hall Meetings
- Video - Educational/Training

NEEDS

MOTIVATIONS

EXPECTATIONS (FEATURES)

Findability (Search, Navigation)

- Need to retrieve information from many different groups within UBC IT
- Looking for information from other departments at UBC
- Looking for very specific information that is on their team's site
- Need easy access to projects and services
- Publish content in multiple sections of the intranet

- Retrieve information that is both from UBC IT and other departments at UBC
- Need to be able to search within specific types of content such as meeting minutes
- Ability to capture metadata, and search for content by metadata tags
- Initial scope of search should be as wide as possible with additional methods for narrowing down search results
- Users can indicate to the system that a particular search result is relevant to their query. The system will remember this indication and aid users the next time they search
- Do not want to hunt around several sources. Would benefit from reporting solutions/ push notification (e.g. dashboards, alerts)
- Have quick links to commonly used information
- Want fast access to their team sites, including their tools, request forms, projects, documentation
- Need to be able to find information based on content, not just by department or organizational structure
- Need to be able to thread or tie patterned information together, potentially across media (documents, emails etc.) by topic
- Global site organization is scalable

Project Information

- To understand what new technologies and services are being introduced by UBC IT
- To learn what and how projects/initiatives will affect their department

- See a list of all projects with high-level project information
- Regular information updates on initiatives (new, updated, cancelled etc – “status” possibly through a subscription or maybe a dashboard)

Collaboration & Sharing

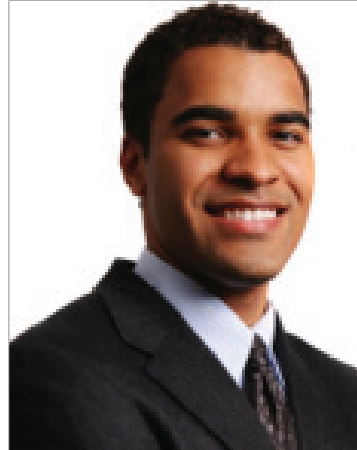
- Want to share with stakeholders and across group project teams
- Need to provide timely information to appropriate groups
- Need to share feedback on content (e.g. accuracy, comment on blog)

- Users are able to get alerts, notifications and communication feeds. They can subscribe/unsubscribe from sources
- Ability to have a shared view of UBC calendars such as academic and business calendar for scheduling projects, holidays, outages to understand impacts on other activities
- Ability to link to social networks both public (facebook) and internal (forum, blogs)
- Ability to provide feedback on content, communication, and services

NEEDS	MOTIVATIONS	EXPECTATIONS (FEATURES)
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<p>Services</p>	<ul style="list-style-type: none"> • Understand what services are offered by UBC IT • Request a service 	<ul style="list-style-type: none"> • Ability to find a service by topic or service name • Classification based on service catalogue
<p>People & Skills</p>	<ul style="list-style-type: none"> • Want to see how many people have particular skills • Need to find experts 	<ul style="list-style-type: none"> • Ability to find all people who have a particular skill • Find somebody that knows about X
<p>Outages</p>	<ul style="list-style-type: none"> • To learn about high-impact system outages • To be prepared and informed of planned outages 	<ul style="list-style-type: none"> • Notification of unexpected and planned outages
<p>HR & Finance Information</p>	<ul style="list-style-type: none"> • To get information about my employment • To get information needed to manage a team/department • To provide self-service information that is easy for others to find and reduces the number of inquiries 	<ul style="list-style-type: none"> • One-stop shop for all information even if some of the content doesn't reside on the UBC IT intranet • Moving paper-based documentation to electronic form • Easy to know in which category to publish information
<p>Personalization</p>	<ul style="list-style-type: none"> • To present content/tools that are relevant to a particular user group • To highlight content that is relevant to me 	<ul style="list-style-type: none"> • Ability to personalize so that different information is presented based on either user profiles, or metadata in source content • Ability for staff to have their own home page where their profile, picture, skills and relationships are stored and where they can store favourite links, documents, and events

Stakeholders

Faculties • Departments/School • Administrators • IT @ UBC • Enterprise Customers



Pete Logan

Pete has been working in the Faculty of Science as IT Operations Manager for the past 3 years. He has a close working relationship with UBC IT and is in contact with different people at UBC IT on a weekly basis.

He wants the intranet to provide information about what UBC IT is doing, especially on what projects they are working on and what services they offer. He also wants to be able to find experts at UBC IT.

“I’m generally happy with the service I get from UBC IT but I want even more collaboration between the different IT groups on campus.”

Key Content

- Client Information
 - Client Service Level Commitments
 - Groups and Committees Overview
 - IT Templates
 - Maintenance Window Calendars
 - News
 - Outages
 - Alerts about outages
 - Notifications about planned outages
 - Detailed information about outages
 - Detailed information about planned outages
 - People / Contact Information
 - General contact information
 - Skills*
 - Experience*
 - Reporting Structure
 - Current & Past Projects
 - Working Groups / Committees
 - Project Information
 - Project Overview
 - High Level Project Status
 - All Project Schedules/Resourcing
 - All Project Tasks/Milestones/Issues
 - Project Templates
 - Detailed project information for project team members
 - Quick links to commonly used tools
 - My Favourite Content
 - My Projects
 - Service Information
 - Service description
 - General service level agreements
 - Contact information
 - Service requests / status
 - Technical Documentation (only IT @ UBC)
 - Video - Town Hall Meetings
 - Video - Educational/Training (only IT @ UBC)
- *Stakeholders can search by skills/experience but they shouldn't get an individual's name and contact info. They should get a manager's contact info.

NEEDS

MOTIVATIONS

EXPECTATIONS (FEATURES)

Findability (Search, Navigation)

- Need to retrieve information from many different groups within UBC IT
- Looking for information from other departments at UBC
- Need easy access to projects and services

- Retrieve information that is both from UBC IT and other departments at UBC
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Project Information

- To understand what new technologies and services are being introduced by UBC IT
- Visibility into projects to ensure that duplicate efforts aren't happening
- To get details about an active project that they are working on or a project they were assigned to in the past
- To learn what and how projects/initiatives will affect their department

- See a list of all projects with high-level project information
- The ability to filter a projects list by different parameters such as topic, project status or team name
- Ability to see "their" projects, past and current (quick access to current)
- Regular information updates on initiatives (new, updated, cancelled etc – "status" possibly through a subscription or maybe a dashboard)

Stakeholders (continued)

NEEDS	MOTIVATIONS	EXPECTATIONS (FEATURES)
Collaboration & Sharing	<ul style="list-style-type: none"> • Want to share with stakeholders and across group project teams • Need to share information with IT pros outside of their group (only IT @ UBC) • Need to provide timely information to appropriate groups • Need to share feedback on content (e.g. accuracy, comment on blog) 	<ul style="list-style-type: none"> • Users are able to get alerts, notifications and communication feeds. They can subscribe/unsubscribe from sources • Ability to have a shared view of UBC calendars such as academic and business calendar for scheduling projects, holidays, outages to understand impacts on other activities • Ability to provide feedback on content, communication, and services
Services	<ul style="list-style-type: none"> • Understand what services are offered by UBC IT • Request a service • See what services are offered to avoid duplication with stakeholders' IT 	<ul style="list-style-type: none"> • Ability to find a service by topic or service name • Regular updates about what services are offered, pricing models, service level agreements, and terms and conditions • Classification based on service catalogue
People & Skills	<ul style="list-style-type: none"> • Need to find experts • Get in touch with someone to have their question answered, keep in touch with UBC IT after their contact leaves the organization 	<ul style="list-style-type: none"> • Find somebody that knows about X
Outages	<ul style="list-style-type: none"> • To learn about high-impact system outages • To get historical details, statistics • To be prepared and informed of planned outages • To avoid getting caught by surprise, ability to plan their own maintenance around UBC IT 	<ul style="list-style-type: none"> • Notification of unexpected and planned outages • Ability to get high-level view of all outages, statistics • Ability to view detailed technical information about an outage and learn from issues and access follow up • Notification of outages only about services that will affect them (if possible)
Personalization	<ul style="list-style-type: none"> • To present content/tools that are relevant to a particular user group • To highlight content that is relevant to me 	<ul style="list-style-type: none"> • Ability to personalize so that different information is presented based on either user profiles, or metadata in source content