

1 Meeting Logistics

Item	Description
Date(s)	Three weekdays, dates TBD
Time	TBD
Location	TBD

2 Attendees

Role	Name
Facilitator	Jeff Handa SunGard Higher Education Luminis™ Services, Senior Process Consultant
Other Participants	TBD (Attendees Identified by Client)
Not in Attendance	TBD

3 Preparation

- Schedule a meeting room to accommodate the anticipated number of participants. Arrange the room in a u-shaped layout and provide the following equipment/materials:
 - Internet connection for consultant's laptop
 - Data projector that can connect to consultant's laptop
 - Whiteboard and/or flipchart with markers
 - Notepads
 - Post-it notes
 - Pens
 - Markers
- Complete the ***Client Content Inventory*** (obtain from the consultant) of the institution's current Internet, portal, and intranet sites:
 - An electronic copy of the completed ***Client Content Inventory*** should be sent to the consultant at least one week prior to the workshop
 - Workshop participants should have printed or electronic copies available during the workshop
- Provide participants copies (printed or electronic) of the following documents prior to the workshop:
 - ***Organizational Information Gathering (OIG) Analysis and Matrix***, and any other related notes from the OIG workshop
 - ***Sample (Blank) Content Matrix*** (obtain from the consultant)
 - ***Content Planning Samples & Suggestions List*** (obtain from the consultant)
 - ***Sample Portal Sites List*** (obtain from the consultant)

4 Purpose

The **Luminis™ Platform Content Planning** workshop assembles a cross-functional team of decision makers and information owners from across the institution to design a blueprint for publishing and managing Luminis™ Platform content. Specific objectives include:

- Identifying policies and processes relevant to content management

- Designing default layouts for primary user groups (including student, faculty, employee, “all users” and any others identified)
- Creating the **Preliminary Content Matrix** and **Preliminary Content Layout** that specify content items, associated channel types, target audiences, content administrators, owners & providers and their associated access permissions
- Identifying content-management workflows and setting expectations for continued content development
- Identifying and assigning content planning items from the Luminis™ **Action Plan**.

During this highly collaborative workshop, participants work from an inventory of recommended content items developed during the OIG interviews and focus groups (the **OIG Analysis and Matrix**), and from client-identified items in the **Client Content Inventory**. To this inventory, participants create a framework and add content-relevant details such as the target audience, presentation format, and location within the portal. Likewise, participants will exclude items from the **OIG Analysis and Matrix** as necessary and document those exclusions. The products of the workshop include a **Preliminary Content Matrix** and a **Preliminary Content Layout** that provide a framework for how role-based information will be presented within the Luminis™ portal at go-live. In addition, workshop participants discuss content-related policies and processes and define the management roles and workflows necessary to support ongoing content development beyond roll-out. Upon completing the workshop, the institution will be prepared to work with its constituents to further develop and finalize its content plan prior to the Content Administrator Training workshop.

5 Client Outcomes

- Identification of content requirements and any key exclusions from the **OIG Analysis and Matrix** and **Client Content Inventory**
- Consensus on selected standard portal layouts and content
- Initial draft of content-management policies and procedures
- Assigned content-specific action steps plan derived from the **Client Action Plan**
- Decisions and action items documented in a follow-up report

6 Deliverables

- **Preliminary Content Layout** diagram representing how content will be presented
- **Preliminary Content Matrix** specifying icons, tabs, channels, content items, audiences, content ownership and owner access rights

7 Agenda

Topic	Time	Owner	Notes
Day 1: Tuesday, TBD 8:00 am – 8:30 am Meet with project lead to set-up room, review delivery, address any concerns	30 min.	Project Lead	Recommended Audience: <i>SunGardHE Consultant and Project Lead</i>
<u>Content Management Overview</u> 8:30 am – 12:00 pm <ul style="list-style-type: none"> • Introduction • Workshop Overview • Luminis™ Platform Demo • Content Management Overview <ul style="list-style-type: none"> ○ The Content Planning Process ○ Roles & Layout Management ○ Content Guidelines ○ Fine-Grained Access Control • Review Content Sources <ul style="list-style-type: none"> ○ OIG Analysis and Matrix ○ Content Inventory ○ Review sample content / channel lists and client demo sites • Q & A 	3 hours	All	Recommended Audience: <i>Organizational Project Team members; Content Subcommittee members; other key content decision-makers, managers, and web developers. Maximum size should not exceed 15 participants</i>
<u>Breaks:</u> 9:30 – 9:45 and 10:45 – 11:00	30 min.		
<u>Lunch:</u> 12:00 pm – 1:00 pm	1 hour		
<u>Developing Content Layout: All Users</u> 1:00 pm – 4:30 pm <ul style="list-style-type: none"> • Develop Content Layout for All-User View <ul style="list-style-type: none"> ○ Login page, navigation bar icons ○ Tabs, columns, channels • Build content matrix section • Identify content owners & suppliers • Identify content workflows & permissions <ul style="list-style-type: none"> ○ Layout-Relevant Attributes ○ Distributed Layout Management ○ Fine-Grained Access Control ○ Tab & Column Options ○ Channel Subscription Options • Wrap Up / Q & A 	3 hours	All	Recommended Audience: <i>Organizational Project Team members; Content Subcommittee members; other key content decision-makers, managers, and web developers. Maximum size should not exceed 15 participants</i>
<u>Breaks:</u> 2:00 – 2:15 and 3:15 – 3:30	30 min.		

Note: Day Two and Day Three half-day sessions may be interchanged, if necessary, for appropriate scheduling of participants. However, employee layouts are ideally identified prior to faculty layouts (if applicable).

Topic	Time	Owner	Notes
Day 2: Wednesday, TBD 8:00 am – 8:30 am Consultant Set Up	30 min.	Consultant	
<u>Developing Content Layout: Employees</u> 8:30 am – 12:00 pm <ul style="list-style-type: none"> Develop Content Layout for Employees <ul style="list-style-type: none"> Tabs, columns, channels Build content matrix section Identify content owners & suppliers Identify content workflows & permissions <ul style="list-style-type: none"> Layout-Relevant Attributes Distributed Layout Management Fine-Grained Access Control Tab & Column Options Channel Subscription Options Internationalization Issues (Where Applicable) Wrap Up / Q & A 	3 hours	All	<i>Recommended Audience:</i> <i>Core Project Team members; minimum of one Content Subcommittee member & and other key content decision-makers and managers representing employee interests; and web developer(s). Maximum size should not exceed 15 participants</i>
<u>Lunch</u> - 12:00 pm – 1:00 pm	1 hour		
<u>Developing Content Layout: Faculty</u> 1:00 pm – 4:30 pm <ul style="list-style-type: none"> Develop Content Layout for Faculty <ul style="list-style-type: none"> Tabs, columns, channels Build content matrix section Identify content owners & suppliers Identify content workflows & permissions <ul style="list-style-type: none"> Layout-Relevant Attributes Distributed Layout Management Fine-Grained Access Control Tab & Column Options Channel Subscription Options Internationalization Issues (Where Applicable) Wrap Up / Q & A 	3 hours	All	<i>Recommended Audience:</i> <i>Core Project Team members; minimum of one Content Subcommittee member & and other key content decision-makers and managers representing faculty interests; and web developer(s). Maximum size should not exceed 15 participants</i>

Topic	Time	Owner	Notes
Day 3: Thursday, TBD 8:00 am – 8:30 am Consultant Set Up	30 min.	Consultant	
<u>Developing Content Layout: Students</u> 8:30 am – 12:00 pm <ul style="list-style-type: none"> Develop Content Layout for Students <ul style="list-style-type: none"> Tabs, columns, channels Build content matrix section Identify content owners & suppliers Identify content workflows & permissions <ul style="list-style-type: none"> Layout-Relevant Attributes Distributed Layout Management Fine-Grained Access Control Tab & Column Options Channel Subscription Options Internationalization Issues (Where Applicable) Wrap Up / Q&A 	3 hours	All	<i>Recommended Audience:</i> <i>Core Project Team members; minimum of one Content Subcommittee member & other key content decision-makers and managers representing students and student services interests; and web developer(s). Maximum size should not exceed 15 participants</i>
<u>Lunch</u> - 12:00 pm – 1:00 pm	1 hour		
<u>Content Policies, Procedures, & Project Milestones</u> 1:00 pm – 3:00 pm <ul style="list-style-type: none"> Review outcomes from three planning sessions and identify gaps for continuing attention Identify key content policies & procedures for development Identify options for supporting content providers and managing content over time Set content-relevant project tasks and milestones <ul style="list-style-type: none"> Review content items in Action Plan Define <i>Preliminary Content Matrix</i> and <i>Preliminary Content Layout</i> completion and validation processes Wrap Up / Q&A 	2 hours	Content Subcommittee Chair	<i>Recommended Audience:</i> <i>Core Project Team members and Content Subcommittee members</i>
<u>Core Project Team Meeting</u> 3:15 pm – 4:30 pm <ul style="list-style-type: none"> Review Content Planning sessions Identify and address outstanding issues Review Organizational Planning Workshop & future services schedule Wrap-up / Q & A 	75 min.	Core Project Team	<i>Recommended Audience:</i> <i>Project Manager, Organizational Project Lead, Technical Project Lead, and other Core Project Team members</i>

8 Decisions

Decisions will be documented in the Content Planning Follow-up Report.

9 Action Items

Action Items will be documented in the Content Planning Follow-up Report.

10 Document History

Revision Record

Number	Date & Sections	Author	Notes
0.1			DRAFT
1.0			
1.1			