1   Meeting Logistics

Item	Description
Date(s)	December 16 – 18, 2008
Time	8:30 am – 5:30pm (Thursday, 8:00am – 5:00pm)
Location	Tuesday – Wednesday, District Office, Thursday – ½ day at each campus

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 (Wireframes) 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, December 16, 2008 **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:* *SunGardHE Consultant and Project Lead*

<u>**Content Management Overview**</u>
 	
8:30 am – 10:00 am
• Introduction
• Workshop Overview
• Luminis™ Platform Demo
• Content Management Overview
  o   The Content Planning Process
  o   Roles & Layout Management
  o   Content Guidelines
  o   Fine-Grained Access Control
• Review Content Sources
  o   ***OIG Analysis and Matrix***
  o   ***Content Inventory***
  o   Review sample content / channel lists and client demo sites
• Q & A
	1.5 Hours	All	*Recommended Audience:*
			Organizational Project Team members; Content Subcommittee members; other key content decision-makers, managers, and web developers. Maximum size should not exceed 15 participants

<u>**Developing Content Layout: All Users**</u>
 	
10:00am – 12:00 pm
• Develop Content Layout for All-User View
  o   Login page, navigation bar icons
  o   Tabs, columns, channels
• Build content matrix section
• Identify content owners & suppliers
• Identify content workflows & permissions
  o   Layout-Relevant Attributes
  o   Distributed Layout Management
  o   Fine-Grained Access Control
  o   Tab & Column Options
  o   Channel Subscription Options
• Wrap Up / Q & A
	2 Hours	All	*Recommended Audience:*
			Organizational Project Team members; Content Subcommittee members; other key content decision-makers, managers, and web developers. Maximum size should not exceed 15 participants

<u>**Lunch: 12:00 pm – 1:00 pm**</u>	1 hour		
<u>**Developing Content Layout: Employees**</u> **1:00pm – 4:30pm** • Develop Content Layout for Employees o Tabs, columns, channels • Build content matrix section • Identify content owners & suppliers	3 hours	All	*Recommended Audience:* *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*

Foothill-De Anza
Community College
District

SunGard Higher Education
Confidential & Proprietary

Page 3 of 7
20-Nov-08

			should not exceed 15 participants

• Identify content workflows & permissions
  o Layout-Relevant Attributes
  o Distributed Layout Management
  o Fine-Grained Access Control
  o Tab & Column Options
  o Channel Subscription Options
  o Internationalization Issues (Where Applicable)
  o Wrap Up / Q & A			

Topic	Time	Owner	Notes
Day 2: Wednesday, December 17, 2008 **8:00 am – 8:30 am** Consultant Set Up	30 min.	Consultant	

Developing Content Layout: Faculty
 	
8:30 am – 11:00am
• Develop Content Layout for Faculty
  o Tabs, columns, channels
• Build content matrix section
• Identify content owners & suppliers
• Identify content workflows & permissions
  o Layout-Relevant Attributes
  o Distributed Layout Management
  o Fine-Grained Access Control
  o Tab & Column Options
  o Channel Subscription Options
  o Internationalization Issues (Where Applicable)
  o Wrap Up / Q & A
	2.5 Hours	All	*Recommended Audience: Core Project Team members; minimum of one Content Subcommittee member & other key content decision-makers and managers representing faculty interests; and web developer(s). Maximum size should not exceed 15 participants*

Content Policies & Procedures **11:00 am – 12:00 pm** • Identify key content policies & procedures for development • Identify options for supporting content providers and managing content over time • Identify Channel Lifecycle	1 Hour	Content Sub-committee Chair	*Recommended Audience: Core Project Team members and Content Subcommittee members*
Lunch - 12:00 pm – 1:00 pm	1 hour		

Developing Content Layout: Students
 	
1:00pm – 3:30 pm
• Develop Content Layout for Students
  o Tabs, columns, channels
• Build content matrix section
• Identify content owners & suppliers
• Identify content workflows & permissions
  o Layout-Relevant Attributes
	1.5 Hours	All	*Recommended Audience: 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).*

o Distributed Layout Management o Fine-Grained Access Control o Tab & Column Options o Channel Subscription Options o Internationalization Issues (Where Applicable) o Wrap Up / Q&A			*Maximum size should not exceed 15 participants*

Wrap-Up and Project Milestones
 	
3:30 pm – 4:30 pm
 	
• Review outcomes from three planning sessions and identify gaps for continuing attention
• Set content-relevant project tasks and milestones
   o Review content items in Action Plan
   o Define *Preliminary Content Matrix* and *Preliminary Content Layout* completion and validation processes
• Wrap Up / Q&A
	1 Hour	Content Sub-committee Chair	*Recommended Audience:*
			Core Project Team members and Content Subcommittee members

Topic	Time	Owner	Notes
Day 3: Thursday, December 19, 2008 **8:00 am – 8:30 am** Consultant Set Up	30 min.	Consultant	
Foothill College Faculty Content Plan Review **8:00 am – 10:00 am** • Review outcomes from combined Faculty Content Planning session • Review Wireframe Models • Identify Foothill College specific content and channels	1 Hour	Content Sub-committee Chair	*Recommended Audience:* *Core Project Team members, Content Subcommittee members, & other key content decision-makers and managers representing faculty interests;*
Foothill College Student Content Plan Review **10:00 am – 12:00 pm** • Review outcomes from combined Faculty Content Planning session • Review Wireframe Models • Identify Foothill College specific content and channels	1 Hour	Content Sub-committee Chair	*Recommended Audience:* *Core Project Team members, Content Subcommittee members, & other key content decision-makers and managers representing student interests;*
Lunch - 12:00 pm – 1:00 pm	1 hour		
De Anza College Faculty Content Plan Review **1:00 pm – 3:00 pm** • Review outcomes from combined Faculty Content Planning session • Review Wireframe Models • Identify De Anza College specific content and channels	1 Hour	Content Sub-committee Chair	*Recommended Audience:* *Core Project Team members, Content Subcommittee members, & other key content decision-makers and managers representing faculty interests;*
De Anza College Student Content Plan Review **3:00 pm –5:00 pm** • Review outcomes from combined Faculty Content Planning session • Review Wireframe Models • Identify De Anza College specific content and channels	1 Hour	Content Sub-committee Chair	*Recommended Audience:* *Core Project Team members, Content Subcommittee members, & other key content decision-makers and managers representing student interests;*

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	November 20, 2008	Jeff Handa	Revised to reflect planning discussion
1.1			

**Foothill-De Anza
Community College
District**

SunGard Higher Education
Confidential & Proprietary

Page 7 of 7
20-Nov-08