



***Know how, right now!***

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## INTRANET CUSTOMIZATION CHECKLIST

Thank you for your recent purchase of the **AgencyCentral Custom Intranet** product. This checklist has been designed to assist you in the collection of information for our initial customization. The sections below are based on the structure of your intranet. The items listed are simply suggestions for possible content of your intranet. You may include virtually any information that you wish and we will do our best to integrate it according to your instructions.

Within a day or two, we will notify you that we have placed your intranet on our Web server so you can review it while collecting information to add to it. You can also visit our demo site for ideas at [www.intranetconcepts.com/demos](http://www.intranetconcepts.com/demos). If you have trouble gaining access, please call 978-499-1897 or email Paul Reynolds at [sales@intranetconcepts.com](mailto:sales@intranetconcepts.com) for the current login.



If you're not sure what to include in your intranet, take a walk around your office. Look at the paper and other information that is probably hanging on cubicle walls, stuffed into binders, piled up on desks, and most often referred to by your staff. This is a great place to start!

### **OVERALL STYLE AND COLOR SCHEME**

We can change the colors and fonts to match your Web site or any other combination that you want. We can change the folder tabs and structure of the intranet so that it matches your agency's structure. For example, instead of a Service tab to incorporate your entire Customer Service department, you might want to use Personal and Commercial tabs instead. Let us know what you have in mind and we'll use our expertise and experience to make it work.

### **OFFICE LOCATIONS**

We will create a page with a map and driving directions links for each office. This page can include phone, fax and 800 numbers, business hours, a location-specific email address (if applicable) and any other general agency information that might be helpful to your staff when speaking with customers. This page can easily be printed or faxed to prospective visitors.

### **INSURANCE CARRIERS**

By providing us with a list of your insurance companies, we will create a page for each carrier, which can be used by your agency to keep track of company-specific information. If desired, we will also add a subfolder for each of your insurance companies — this will give you a place to store scanned notices, email messages and other information received for each carrier. If you want, we can also separate the list between personal, commercial and/or life companies — just say the word!

### **EMPLOYEE LIST**

This list appears on the intranet home page as well as the Contacts tab. It can include any information you want, such as office, department, phone or extension, email address and other miscellaneous information such as home or mobile phone numbers that is relevant to your staff. The best way to provide this information for us is in an Excel worksheet; you can download a sample worksheet at [www.intranetconcepts.com/customize](http://www.intranetconcepts.com/customize).

## ❑ CONTACT LISTS

At last, a place to store all of your phone and fax numbers that aren't easily accessible in your system. This section can include claims services, vendors, speed-dial numbers and other reference contacts that are may currently be included on those outdated lists that are hanging around the office.

Note: If you are already keeping track of your contact information in shared folders in Outlook on an Exchange Server, you can link directly to these public folders instead of duplicating the information in your intranet. For instructions, please refer to the "Cheatsheets" section of the intranet help desk.

## ❑ AGENCY LOGO

Whenever possible, we'll copy your agency logo right from your Web site. If this is not available, you can send us the image file (preferably in BMP, JPG, or GIF format). If you would like for us to scan the image from your letterhead, please mail it to us at the address shown at the top of this document.

## ❑ LIST OF WEB SITES

Does everyone have their own "Favorites" list in Internet Explorer? Has the agency compiled a single list for everyone? If not, now is a good time to do so! We have already started the list with our favorites... just click on the "On the Web" button on the intranet home page to see what we mean.

To export your favorites list from Internet Explorer:

1. Click on **File → Import and Export**.
2. When the wizard starts, click on **Next**.
3. Select **Export Favorites** and click on **Next**.
4. Select the top level of your Favorites folder and click on **Next**.
5. Select a location for the export list and click on **Next**.
6. When the export is complete, click on **Finish**.

## ❑ ADMINISTRATIVE FORMS

This section can include virtually any forms or applications being used by your staff, such as non-standard applications, HR forms, request forms, etc. We're not trying to replace the forms capabilities of your agency management system — we're giving you a place to put all of the other forms that aren't in there. We can also convert your paper forms into Word templates or scanned PDF documents that the user can fill out electronically. Just mail or fax them to us.

Note: If you don't want to use your free intranet customization time for this process, call us for prices on doing them as a separate project for you.

## ❑ CUSTOMER SERVICE WORKFLOWS

All written procedures, instructions, and workflow documents should be included in your intranet. Not only does this provide new service employees with an orientation of their job, but gives your existing staff an instant reference to all of the information needed for them to do their jobs efficiently and effectively. If you don't have these procedures written yet, no to worry! You can add them later to the place reserved for them in your intranet.

## ❑ EMPLOYEE HANDBOOK

Your entire handbook and/or employee benefits summary will be incorporated into its own section in the intranet for quick reference and easy updating. We can simply link your existing Word or PDF documents or convert them to a handy HTML version that provides quick links to each section. To see an example of the HTML version, please visit [www.intranetconcepts.com/sample/handbook](http://www.intranetconcepts.com/sample/handbook).

## ❑ HUMAN RESOURCES INFORMATION

Think of this as your electronic HR department. What's the most frequently asked-for information? Details about employee benefits? Payroll forms? Vacation requests? Holiday listings? New employee orientation packets? You finally have a place to store all of your employee-related information, including personnel information if you want to establish password-protected areas with your network security software. If you have benefits booklets, you may want to check the provider's Web site for a PDF version that you can link to for quick reference.

## ❑ COMPUTER SYSTEM INFORMATION

Here's the place to include your system-related information, such as inventories, login/security information, how-to procedures, troubleshooting information, and other instructions. Be sure to indicate which documents belong in the common area and which belong in the restricted (password-protected) section. Some agencies have taken this area a step further and included electronic versions of their user manuals for the phone system, voicemail, copier, etc. in this section so that everyone has instant access to information on all the office machines.

Note: All password-protection is provided by your network software, once the intranet has been installed in your office.

The content of your intranet is only limited by your imagination. If you have any questions or would simply like to "bounce ideas off of us," please call me at 970-252-1684 during normal business hours. You may also send an email to me at [support@intranetconcepts.com](mailto:support@intranetconcepts.com) and you will be contacted as quickly as possible. We will be happy to help you in any way that we can to make this process work smoothly for everyone involved.

I look forward to working with you!

*Kim.*

Kim Floyd, Director of Support & Development  
Intranet Concepts, Inc.