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Beyond the grapevine By Divina Paredes MIS

The need to consolidate valuable research data in the wake of a corporate merger leads to the birth of a well-used intranet.

Concerns regarding corporate data also emerged. As Dennis Robinson, winery services manager points out, “When Montana took over Corbans, there was a huge number of people who had stuff in their PC. Basically, staff may have left and had important research work sitting on one PC or a local server.”

There was always the possibility employees could be duplicating works unknowingly, or important research was not being distributed. And when employees left the organisation, their research findings might easily have been lost, he says.

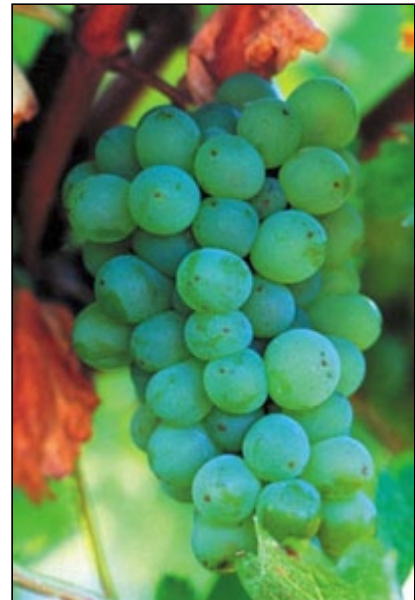
“We had to do something. The company was too big not to have a standard repository of what we’ve done with all the research and development, laboratory, operating procedures – along with engineering procedures – so people would know what they’re using is the correct one.”

Robinson, who is based in Napier, was tasked with developing the central repository containing this valuable intellectual property. After five months of development using the IBM Lotus Workplace team, Montana rolled out its first intranet.

Greenfields application

Robinson had no prior knowledge of intranets. When he learned of his latest assignment, he checked whether colleagues in New Zealand and Australia had similar projects and found none. “So we just took the bull by the horns and had a go at it.”

What Robinson did have was a thorough understanding of the wine industry – 35 years of experience starting as a cellar hand with McWilliams in Napier, before moving on to become laboratory technician, assistant winemaker and winery manager. He had also been part-owner and developer of a vineyard, and trained in Australia and France. He had a stint as the bottling manager with Cooks



McWilliams, which was bought by Corbans and eventually by Montana Wines.

At Corbans and Montana, Robinson took a national role across all sites as winery services manager. This position with Corbans included responsibilities for winery applications software development and support, resource consents, risk management and health and safety. At Montana, Robinson's work became less encompassing but more focused.

His range of experience helped when he was tasked with taking charge of the intranet. "Andy Frost [senior winemaker, research and technical services and Robinson's boss] and I had a very extensive background knowledge of most disciplines in our industry, having worked from the bottom up, in many cases. So we have a good feeling as to what is meaningful and important and what the user would find simple, accessible and also helpful."

Flagging the prototype

Robinson knew a crucial part of the project's success was getting the support of the Montana staff. "This intranet would not exist without input from so many people within the company across so many disciplines." It was important, he says, for the intranet to be known as a "knowledgebase that everyone owns and supports".

Robinson worked with Frost on a prototype that contained less than 1 per cent of the applications the current intranet contains. During a conference for managers in Taupo, he showed how the application worked using the example of a winemaker in Gisborne checking if somebody else in the company has done research into micro-oxygenation. A quick search in the intranet reveals a colleague in Hawke's Bay has done work on the subject, and covered the topic he wants to explore. The Gisborne specialist downloads the report and queries the author by email for any updates on the research that may not have been published yet on the intranet. "Under the old system, you would probably not have known who to contact, because the company is so big."

While response to the project was positive, Robinson admits, "It took a few months before people started to realise, 'I don't have to ring somebody to find out how to do this. It's all in there.'"

The intranet's key features – a repository of the company's intellectual property and fast delivery of up-to-date research and development information – mean security is an imperative. Robinson explains password protection has been set up for all secure areas. When a user logs in, access is restricted on a rules basis. "You only see what you are meant to see." Robinson says company-authored and published articles are all subject to copyright and only the administrator or the author of the article can change any data. "Should anyone get in and print something, we still have our copyright attached to it." Employees are also cognisant of the company policy on computers and the internet, and on publishing company information on the site.

No frills

Another aspect Robinson focused on was keeping the interface as simple as possible. As he points out, "The most challenging part was probably getting simplicity in it so that we can convince people it was easy to use, that they could see their own section, and that they could find what they want in it easily."

And Robinson strove for a consistent look and feel from section to section. “When one person gets familiar with one section and goes to the next section, there would be pretty much a mirror image [of the opening page] with different data.”

As much as possible, the reports are in HTML format “to make for easier viewing”. Even graphs are hidden in the index unless the user wants to see them and clicks on the link to that information. “I don’t want too many graphs and/or results in a report. It’s easier to read the text, and view the results separately if interest goes that far.”

The result is a more “user friendly environment,” he says. “It enables you to do more things and is more particular to the needs of the people.”

He says one of the intranet’s more “powerful” features is the technical publications section. Montana sub-scribes to a number of technical magazines and the hard copies are kept in wineries in Gisborne, Marlborough and Blenheim.

The section has an index of all the publications, one of the more important of which is the American Journal of Enology and Viticulture. He found a software program that converts the table of contents from Adobe to text format – thus enabling far more effective search results to be obtained. Montana bought CDs of the magazine back to 1950, when publication began. So if somebody does a historical search associated with the publication dating back to 1950, the material can be retrieved as an Adobe file.

A team effort

Robinson says the intranet is not only for specialists. “It’s available for information gathering from a high technical level right down to the cellar worker, and it applies across the vineyards, laboratory and engineering, as well.”

He says support of the different departments in completing the reports is important. “We got everybody on board and they’re quite keen to have their work being published,” says Robinson. “Because I’ve spent a bit of time in the industry in wine and laboratory work, I can put it all in that perspective.”

The system is also a good tracker of status of research and development projects. For instance, it is possible to track projects being undertaken by a particular research specialist.

The projects are presented in a timeline and there are key symbols to indicate whether it is in progress, or a report is already due, in which case reminders are sent.

“Most of the people who contribute to it are conscious of what they’re doing and what they need to do to complete the task, so again there is general ownership of everything.” Each search will also come up with a link to a related website via key words associated with that website. “We’ve made this the tool to get to the internet.”

Robinson acknowledges his work presents a continuing challenge. “Everything’s happening all the time. It’s very much a living document. It’s never going to be a completed application – it can’t be,

really.”

With hindsight, though, he says there would have been some things he would do differently if he were to do it all over again.

“I would probably try and simplify things so our file sizes were reduced so ongoing data opens up more quickly. I would also reduce the size of a lot of my HTML links.”

He doesn't want “radical changes” to features with which users are already familiar, but plans to implement these changes in the new sections.

Indeed, one of the most important lessons he had learned in implementing the knowledge management system is that in such a project change can be dynamic – as can people.

“New ideas and disruptions are part of the whole scenario,” he reckons. “So be prepared to change things – often. Also, be prepared to decide.”

He says it helped finding a “mentor” during the rollout, Tom Dale, Montana's internet development manager. “When you start something like this you've never done before, you need a mentor,” he says. “Ask if you don't know something – people don't mind helping.”

Again, simplicity is foremost. “Remember, it's a tool to help, rather than confuse.”

Rate your challenges

When interviewing IT professionals and senior executives, MIS always asks them to rate the most challenging elements of managing a project. Here, Dennis Robinson, winery services manager, rates his project management challenge in implementing the intranet project of Montana Wines.

Most challenging

Strategy and planning

Managing emergencies

Keeping projects on time and on budget

Getting support of other company stakeholders

Finding and motivating the right staff

Getting support of board and CEO

Least challenging,

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