

# WEBSITE TRANSITION STATEMENT OF WORK

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This document outlines the process for updating the campus website and sub-sites within it to take advantage of the new Ingeniux Content Management System and a variety of additional services. This transition will require significant contributions from both iCIT and the owners of the various sub-sites; this document also describes these requirements.

For the purposes of this document:

- Website refers to a sub-site within the campus website, unless “campus website” is stated.
- Customer refers to the unit represented by the website.
- A content owner is a named individual who has responsibility for some or all of the content within a website.
- Ingeniux refers to the Ingeniux Content Management System deployed at UW-Whitewater.

## OVERVIEW OF THE CAMPUS WEBSITE TRANSITION INITIATIVE

In April 2011, iCIT redeployed the campus homepage; the main audience, navigation, and landing pages; and the University News/MMR website using a new Web Content Management System (CMS) built on the Ingeniux CMS software. This event was the result of nearly 2 years of collaboration between iCIT’s Web and Infrastructure Teams, MMR, and the campus Web Advisory Group (WAG), and it marked the beginning of a major effort to transition the entire campus web presence to this new system.

The goals of this initiative go far beyond copying the existing campus web presence into the new system. The transition process requires the review, restructuring, and redesign of every website prior to redeployment. The results of this process will be websites that contain up-to-date information presented in a coherent manner that is consistent in look and feel with the rest of the campus website and is compliant with industry standards for accessibility and browser compatibility.

iCIT is committed to enabling and facilitating this transition through the provision of technology, guidance, graphic design, training, and support; however, the success of this initiative is dependent on the effort of the customers and content owners who provide the essential elements of website structure and content, and who are responsible for ongoing maintenance of website content.

## SERVICES AVAILABLE AFTER TRANSITION

When the transition process is complete, the content owner(s) for a website will have access to their website content in the Ingeniux CMS, a powerful tool which enables true self-service maintenance and updating of a website’s content.

In addition, iCIT is working to expand the services provided for transitioned websites to include:

- Periodic reports to content owners that will alert them to content quality issues including broken links, spelling errors, web accessibility problems, and potential browser compatibility issues.
- Content expiration alerts, which will notify content owners when pages have not been reviewed or updated for a period of time. Out-dated pages will be automatically removed from the website. Expiration periods range from one semester to several years, depending on the content of the pages.
- Improved Search Engine Optimization (SEO) with respect to both the campus website search engine and third-party search engines such as Google and Bing.
- Replacement of server-side script such as PHP with consistent, safe, and stable CMS managed content and forms.
- Integration with a web analytics system that will facilitate future website improvement efforts.
- Integration with an automated language translation service that will allow users to view the website in their preferred language.
- Utilization of authoritative single sources of data such as directory and course information. Single-sourcing data helps ensure data consistency and enables automatic updates to the website when the authoritative source is updated.

## TRANSITION PROCESS

The UW-Whitewater web presence is very large, consisting of well over 10,000 pages and more than 50,000 files. For perspective consider that, averaging one minute per page, it would take more than 166 hours just to read every page on the campus website, and this does not include the PDF's, Word files, and other non-HTML documents. Clearly, the review and redevelopment tasks involved in transitioning the entire campus web presence will require a significant commitment of time and effort by many members of the campus community.

## PRIORITIES

The priorities for transitioning websites have been set by the campus Web Advisory Group, which is composed of senior administrators and designated representatives of the various campus constituencies with an interest in the campus web presence.

The priorities are organized into three general phases.

In the first phase, the focus will be on websites with significant external audiences or recruitment impacts. This phase includes websites for: Admissions, the Registrar's Office, Financial Aid, First Year Experience, the University Foundation, Global Education, the University Library, Continuing Education, and Camps and Conferences.

In the second phase, the focus will be on websites supporting the core academic mission of campus. These websites include the colleges, Graduate Studies, and Undergraduate Research.

The remaining websites will be handled in the final phase. If needed, the WAG will provide further guidance regarding prioritization within this group when this phase is entered.

## ICIT INVOLVEMENT AND RESPONSIBILITIES

iCIT Staff will provide the following:

- The underlying technologies to support the new campus web presence, including researching, planning, implementing, maintaining, and supporting of these systems
- Guidance to the customer throughout the transition process as described in the stages below
- Graphic design of the new website look and feel
- Implementation of designs in the CMS including all HTML, CSS, XML, and XSL coding
- Training on how to enter and maintain content in the Ingeniux CMS
- Assistance with format and layout of content in the new website
- Deployment of the new website, including the updating of links, creation of redirects, and general testing
- Ongoing support and troubleshooting

## CUSTOMER INVOLVEMENT AND RESPONSIBILITIES

To enable a successful website transition, the customer is responsible for providing the following:

- Active participation and timely decision-making throughout the transition process
- Information and direction regarding the overall structure of the new website
- Creation and ownership of all textual and media content for the new website
- Sufficient resources for the timely completion of content entry
- Careful testing of the new website immediately after deployment

For the transition process to proceed efficiently, the customer must:

- Identify a Primary Customer Contact who will have responsibility for and authority to relay information and decisions between the stakeholders and the Web Team
- Identify all relevant stakeholders before beginning the structure and design conversations
- Ensure the availability and participation of the stakeholders throughout the design process

## TRANSITION STAGES

### A. PROJECT INITIATION

#### *Web Team driven*

A member of the Web Team will contact the head of the customer unit to notify them that resources are available to begin work on the customer's website. This Agreement document and other information will be provided to help the customer leadership understand the scope of this project. The Project Initiation stage is completed with the Project Kickoff Meeting.

### B. PRIMARY CONTACT IDENTIFICATION

#### *Customer driven*

A Primary Customer Contact must be identified so that the Web Team knows who to communicate with during the project. This person should be the project lead on the customer's side – i.e. someone who will track the status, organize the meetings, and relay any final decisions on behalf of the customer. In general, this person will be copied on any Web Team communication with other representatives of the customer unit.

While it is not essential that the primary contact be the final decision-maker for the customer, the Web Team will proceed as if any information or decisions coming from the designated primary contact are coming from the final decision-maker.

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## C. STAKEHOLDER IDENTIFICATION

*Customer driven*

As with any project it is essential to identify the key stakeholders and involve them from the beginning of the project. Included in the stakeholders should be members who can represent the requirements of the target audiences.

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## D. PROJECT KICKOFF MEETING

*Customer organized, Web Team chaired*

The project kick-off meeting is the first opportunity for all of the project stakeholders to meet with the Web Team to learn about and plan the transition project for their website. In this meeting, the Web Team will provide an overview of what is involved in the transition process and what will be expected of the stakeholders in the course of the project. Key milestone dates for the project will be established and a preferred week for deployment will be determined.

In some cases, the Project Kickoff Meeting will also be used to begin the Website Review and Visioning effort.

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## E. WEBSITE REVIEW AND VISIONING

*Customer drive, Web Team facilitated*

During this stage, the customer is responsible for determining the key elements and content types to be included in the new website. This may require a few meetings of the stakeholders and should include consideration of the target audience(s) and primary objectives of the website. Sources of information for this effort may include a review of the existing website, a survey of website users, and web analytics data, if available.

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## F. WEBSITE STRUCTURE DESIGN (INFORMATION ARCHITECTURE)

*Customer driven, Web Team facilitated*

When the stakeholders have developed a good understanding of who they are targeting, why they need a web presence, and a general concept of what content the website will contain, the Web Team will work with them to determine how the website should be structured to accomplish the stated objectives.

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## G. VISUAL DESIGN

*Customer/Web Team collaboration, Web Team developed*

When the structure of the future website has been finalized, the Web Team will work with the stakeholders to develop a design concept consistent with common campus style requirements. The Web Team will develop mockups of the visual design for the website and work with the stakeholders to refine them as necessary.

One of the Web Team's objectives during this stage is to ensure a consistent look and feel is maintained across the entire campus website. To this end, a style guide has been developed and all transitioned websites will comply with the requirements of this guide. These requirements include the directive that all customer sub-units be included in the transitioned website.

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## H. CONTENT CREATION

### *Customer driven*

When the visual design has been finalized, detailed content creation can begin. One or more content owners should be identified to drive this process and to ensure the creation of accurate, high-quality, and internally consistent content. Content creation is entirely the responsibility of the customer, though the Web Team can help provide general direction to content owners if requested.

Content creation includes drafting and polishing copy, creating or selecting photos and other media, and determining the organization of these elements with the website structure and page templates. Content creation may require a great deal of time and effort, particularly if substantial additions or modifications will be made to the existing website content.

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## I. WEBSITE CODING

### *Web Team responsibility*

When the visual design has been finalized, the Web Team can begin writing the HTML, CSS, XML, and XSL code necessary to implement the new design in Ingeniux. This work can be completed in parallel with Content Creation, and may take several weeks, depending on the number and complexity of the required templates.

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## J. CONTENT ENTRY

### *Customer driven, Web Team supports*

When the website coding is complete, the Web Team will train the content owners how to enter the content into Ingeniux. Upon request, the Web Team will perform reviews of content that has been entered and assist with layout and formatting issues if they arise.

This stage is can be tedious and time-consuming. Ingeniux is optimized for editing and updating websites after they have been setup in the system; however, to make this possible, the initial setup and content entry require significant effort.

The duration of this phase is dependent on several factors including:

- Completion of Content Creation prior to Content Entry. The content must be ready for entry, as rework of the content at this point is very time-consuming.

- Availability of resources for content entry. iCIT has very limited resources available for content entry. In most cases, it will be necessary for content owners or other individuals working for the customer unit to complete the content entry.
- Complexity of the website structure and page layouts. The more types of and locations for content on a website, the more difficult and time-consuming it will be to complete the content entry.

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## K. REVIEW AND APPROVAL

### *Customer driven*

When Content Entry is complete, the Web Team will publish the website to a preview location accessible on-campus only. The customer is encouraged to present the website to the stakeholders for final review. When the primary customer contact notifies the Web Team that the website has been approved, a deploy plan will be developed.

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## L. DEPLOYMENT

### *Web Team (technical) and Customer (testing)*

When the customer has provided final approval to the Web Team, a deploy plan will be developed and executed. The deploy plan will include a plan for updating links on the campus website, creating redirects to handle off-campus links and bookmarks, and testing the website after the transition occurs. A date for the transition will be set based on iCIT and customer availability. In most cases, these the transition event will occur between 5 a.m. and 7 a.m. on a Thursday morning.

## STALLED PROJECTS WILL LOSE PRIORITY

iCIT frequently faces challenges with website projects becoming stalled due to insufficient progress by the customer. This usually occurs in either the Website Review and Visioning stage or the Content Entry stage. Stalled projects negatively impact other transition projects and waste scarce university resources due to the additional effort and rework often associated with restarting a stalled project.

To reduce the impact on other priority projects, a stalled project will be moved to the end of the Web Team's active project queue. No further work will be completed on the project until it again reaches the top of the queue, which may be a period of a few weeks to several months.

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## "AT-RISK" PROJECTS

A project pending work or a decision by the customer may be considered "at-risk" if two weeks elapse without evidence of progress or the delivery of the decision. The Web Team will notify the primary customer contact, the Web Team Manager, and the CIO via email when a project is determined to be at-risk. It is the customer's responsibility to respond with a status report showing work is progressing, the required decision, or a hard date when the status report or decision will be provided.

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## “STALLED” PROJECTS

A project may be deemed to be stalled if any of the following occur:

- No satisfactory response (i.e. the required decision, a status report demonstrating progress, or a hard date when these will be provided) is received in the 5 business days after an at-risk notice has been provided. (Reasonable efforts will be made to determine if the contact has been out of the office.)
- A hard date that was provided in response to an at-risk notice is missed.
- The Web Team determines that waiting until the hard date will cause non-trivial delays to other active projects.
- Three or more separate instances of falling into the at-risk status occur on the same project.

Appeals regarding loss of priority due to these rules may be directed to the Web Team Manager or the CIO.

## ON-GOING MAINTENANCE AND RESPONSIBILITIES

When a website is deployed in Ingeniux, it remains the responsibility of the customer to ensure that the content is maintained and up-to-date. If ownership of the content shifts within the unit, the Web Team should be notified so that they may update access rights, provide training, and ensure that automated notices are properly directed.

To assist in the maintenance of high-quality, up-to-date content across the campus web presence, iCIT is implementing several new processes and tools.

## CONTENT EXPIRATION/NOTIFICATION

All pages in the Ingeniux CMS will be configured with ‘expired’ content notification. The notification period is divided into segments of 3 months, 6 months and 12 months. The notification clock is automatically reset every time the page content is accessed or updated in Ingeniux; thus, the system is designed to encourage regular review and maintenance of the website content.

As a page nears an expiration segment, the content owner registered for that page will receive a notice via email. The notice contains a link to the page editor and how long it has been since the page has been updated. If a page is allowed to reach the 12 month expiration segment, the Web Team will automatically be notified with the option to remove the page from the website until it is reviewed or updated by the content owner.

## QUALITY AND ACCESSIBILITY MONITORING

A new system, based on the PowerMapper SortSite technology, will be configured for each website when it is transitioned to Ingeniux. This system will perform monthly compliance checks of each website. A report will be published for each content owner, and they will be sent a notification noting the number of issues identified. The content owners are then responsible for reviewing these reports and correcting any identified issues.

The SortSite system evaluates a website’s accessibility by checking it against 200 rules set up in the Federal Section 508 Standards<sup>1</sup>, WCAG1<sup>2</sup>, and WCAG2<sup>3</sup> guidelines. The analysis also checks for website quality issues related to

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<sup>1</sup> <http://www.section508.gov/index.cfm?fuseAction=stdsdoc#Web>

<sup>2</sup> <http://www.w3.org/TR/WCAG10/>

browser compatibility<sup>4</sup>, compliance with WC3 standards<sup>5</sup>, SEO best practices for major search engines, and government usability suggestions<sup>6</sup>.

## LIMITATIONS TO WEBSITE CONTENT AND MODIFICATIONS

### SERVER-SIDE SCRIPTS

To ensure stability and enhance security, server-side scripting such as PHP is not supported by the servers hosting the websites managed by Ingeniux. In most cases, functions that had been provided by server-side scripting can be handled by Ingeniux through alternative mechanisms. In the event that a script is required to perform a required function, the script will be hosted separate from the campus website.

### CSS, STRUCTURE, AND LAYOUT

The integration and complexity of the structures and layout of websites within Ingeniux require a tightly controlled approach to website management. All changes to CSS files, page designs, and website structures will be completed by the iCIT Web Team to ensure proper functioning within the target pages and across the campus website. User access to these components will not be granted.

### FILE ACCESS

Websites managed by Ingeniux can only be modified via the Ingeniux interface. No FTP, DFS, or other direct access to the hosting environment is available.

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<sup>3</sup> <http://www.w3.org/TR/WCAG20/>

<sup>4</sup> <http://www.quirksmode.org/compatibility.html>

<sup>5</sup> [http://validator.w3.org/docs/help.html#validation\\_basics](http://validator.w3.org/docs/help.html#validation_basics)

<sup>6</sup> <http://usability.gov/>