

Colorado.gov

Content Management System

Information Manual

Version 1.0

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1 Introduction to the Content Management System

The Content Management System (CMS) allows a content expert that is not versed in Web languages--such as html, java, Dreamweaver, etc.--to manage a Web Site's content, layout, and style. Colorado.gov uses the Fatwire CMS to empower our partners with the ability to deploy interface and site navigation enhancements without the need of a Web versed expert.

Workflows can be established, which identify a chain of approval, before changes are published. Changes can be made instantaneously, increasing the overall value of your Web Site.

The advantages of CMS are:

- Content experts, not Web versed experts, can manage text changes.
- The EGE does not have to host the Web site.
- Time spent managing interface enhancements decreases dramatically.
- There is no cost to using CMS.
- Supports multiple sites, initiatives, and applications.

Please continue reading to find out more about the Fatwire CMS and working with Colorado.gov.

2 Information Architecture and Requirements

Information architecture (IA) is the science of figuring out what you want your site to do and then constructing a blueprint before you start developing. The nice part is you don't need to be an expert in IA to apply its principles. Just knowing the basics of the process can save both time and money in the long run. Solid system architecture reduces development time, increases user time spent on your site, and most importantly, assures business needs and user needs are met in harmony.

2.1 REQUIREMENT GATHERING

Initially, it is important to gather opinions of agencies and co-workers in order to define Web site goals. Once opinions are gathered, place them in a coherent, weighted order of importance. Documentation is critical at this stage in order to create effective communication. Another concentration point is identifying your audience. Once the necessary research has been completed, start organizing the future site into pages of content and functions.

2.2 COLORADO.GOV TOOLKIT

Typically, there are five sections within a design document: Layout, Application Design, Graphic Design, Development and Testing. As Colorado.gov provides a toolkit at www.Colorado.gov/toolkit, which is available for public consumption, the layout and design steps are already determined. By organizing and simplifying this toolkit, the State of Colorado now has a portion of the tools necessary to become a nationwide leader in overall Web presence, especially in regards to consistency and branding across agencies. The toolkit includes basic Web templates, branding and logo guidelines, accessibility information and even some tutorials.

2.3 508 COMPLIANCE

When modifying or creating a Web site, Section 508 must be in compliance. 508 Compliance is a section within the Rehabilitation Act of 1973. This section requires electronic and information technology developed, procured, maintained or used by the Federal government to be accessible to people with disabilities. Although Section 508 was initially added to the Rehabilitation Act of 1986, amendments in 1998 considerably expanded and strengthened technology access requirements.

2.4 FATWIRE SOFTWARE

The Fatwire Content Server (CS) product family is a database-driven, high-performance content management and delivery system. You can use Content Server to manage and deliver content on Web sites and other formats (WAP, for example). The Content Server product family includes the following:

- **Content Server** - The core application upon which all the content applications are built. It is the operating system that powers the entire CS product family, stores the content you are managing, and serves content to your online site.
- **Satellite Server** - A remote caching program that allows your site to scale as it grows, and can prevent users from requesting pages before they have been pre-generated.

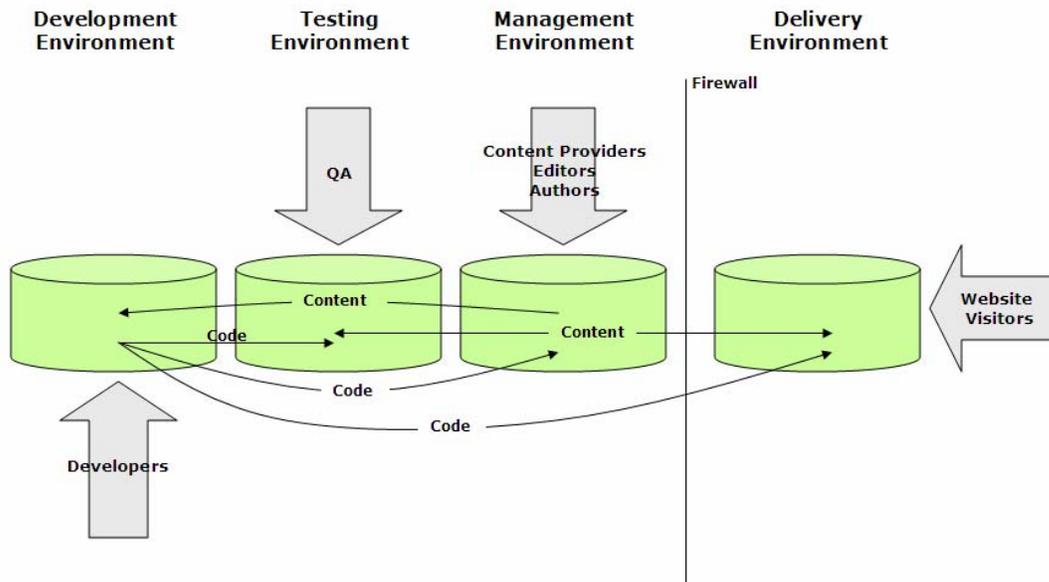
When you are using Content Server as your content management system, you and your team can work with up to four different systems:

- **Development System** - where the developers and designers plan and create the online site.
- **Management System** - (also referred to as "the staging environment") hosts content management sites where the content providers develop the content that is delivered to the online site. Using workflow and revision tracking, you track and monitor content until it is approved and published to the delivery system.

- **Delivery System** - (also referred to as “the production environment”) where the content or products that you are selling are served to your visitors or customers. In other words, it hosts the online site.
- **Testing System** - where the Quality Assurance group tests the performance of both the management system and the delivery system.

2.5 CONTENT SERVER ARCHITECTURE

The following diagram depicts how content providers incorporate content within all environments through the content server.



3 Working with Colorado.gov

To work with Colorado.gov, whether it's re-designing a Web site or developing an application, there are only three main requirements:

1. Complete Eligible Governmental Entity (EGE) Agreement

An EGE agreement states that your department, agency or political subdivision within the state (including local government) is willing to work with SIPA and Colorado Interactive with respect to the state portal. This intergovernmental agreement was developed in coordination with and satisfies the Attorney General, State Controller and SIPA Legal Counsel. The EGE agreement does not bind departments to working with SIPA, but is a necessary step to begin a project immediately or in the future.

2. Submit Project Request Form

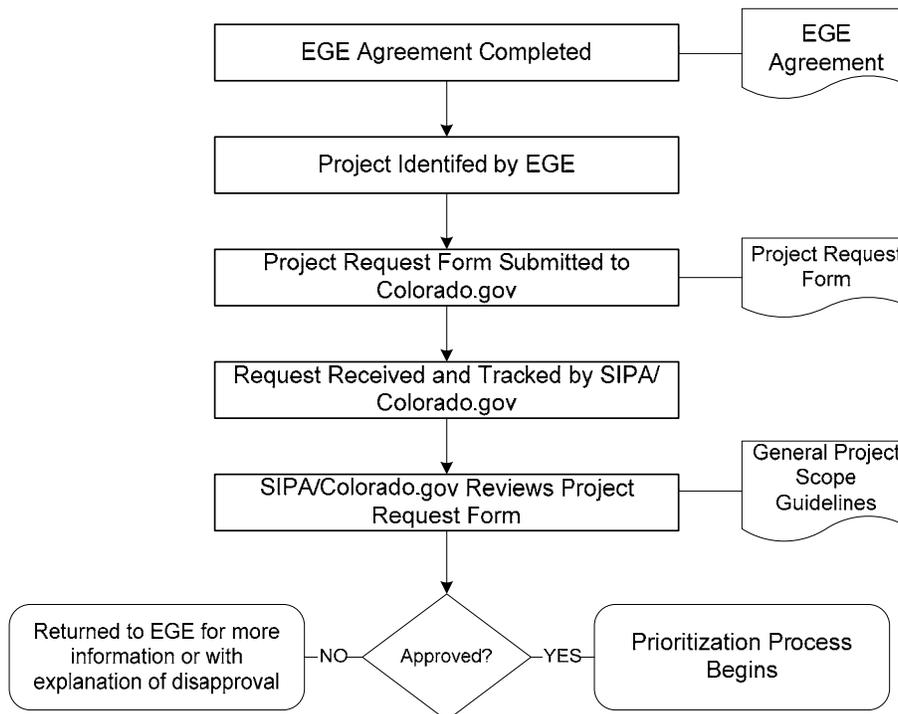
A project request form, detailing information about the proposed application, available department resources and the perceived benefits, must be submitted and approved by Colorado.gov and SIPA. The overall project request process assures each portal project is considered in the same manner and creates effective communication between SIPA, Colorado.gov and EGE's. To review a sample Project Request Form, refer to Appendix A.

3. Negotiate and Sign Work Order

A work order, specific to your project, will be negotiated so that both parties understand the scope of work, fees involved, or timelines required. To review a sample Work Order, refer to Appendix B.

All forms are available via www.Colorado.gov/sipa/workingsipa.html. Once a project is accepted, Colorado.gov and SIPA prioritize and develop projects based upon the Prioritization and Queue Management Process (refer to Appendix C to view the process).

3.1 PROJECT REQUEST PROCESS FLOW

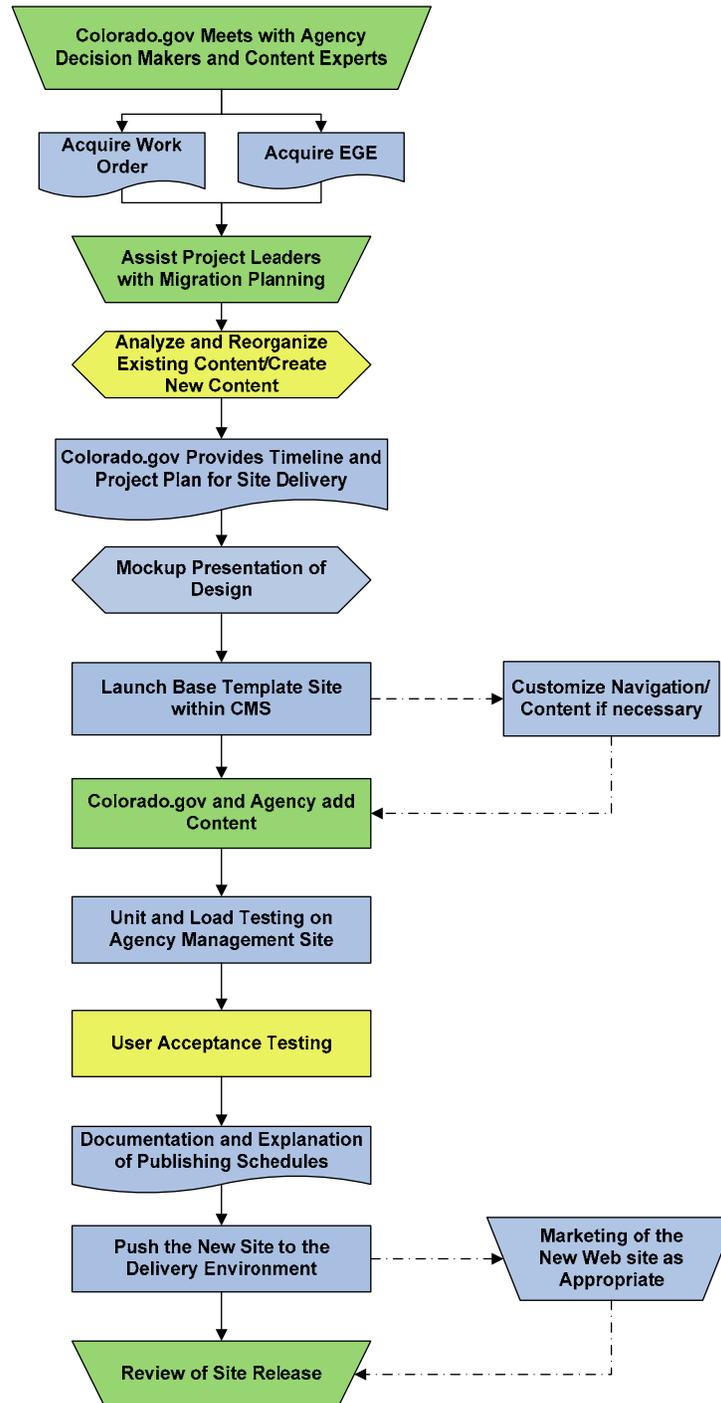


3.2 PROCESS DETAIL

1. An EGE Agreement is already completed.
2. An EGE identifies a project suitable for development through the Portal.
3. The EGE fills out and submits a Project Request Form with assistance from SIPA/Colorado.gov.
4. SIPA/Colorado.gov reviews the Project Request Form with respect to the General Project Scope Guidelines.
5. The Project Request is approved or disapproved.
6. If Project Request is approved, the Prioritization and Queue Management Process begins.
7. If the Project Request is disapproved, it will be sent back to the EGE for additional information/clarification or with reasons for disapproval.

4 Produce a Site with CMS

Colorado.gov teams with our state agency partners to design, build, deploy and test Web sites through a powerful, easy-to-use content management system. We use a standard, proven process that drives end-to-end project initiatives. Moreover, Colorado.gov is capable and available to assist and guide our partners at any step along the way.



4.1 PROCESS DETAIL

8. Meet with Colorado.gov

- This meeting entails a Content Management System (CMS) demonstration, an overview of usable design templates, and a review of the current agency Web site. The session's goal is to determine a plan for restructuring the existing site.

9. Review and Sign the Work Order

- Prior to project placement on the development schedule, the Agency and Colorado.gov review and sign an Eligible Governmental Entity (EGE) agreement and work order.

10. Migration Planning

- For purposes of scope, task assignment, and timeline assessment, a project plan matrix should be published. The Colorado.gov assists with this documentation set up if necessary.

11. Analyze, Reorganize, and Create Content

- Colorado.gov team analyzes the existing site content and produces a summation of the site along with a 'Best Practices' document for publishing content to the Web.
- Agency Contributors determine content to display and new navigation structures according to pre-determined templates produced by the Colorado.gov Design Team.
- Once the information is architected, site content is organized logically making it easier to perform the initial insert of content into the system.

12. Present Timelines and Project Plans

- Each agency has its own content-specific needs; Colorado.gov Project Managers review all content and create a work estimate and project plan.

This is a sign-off step in the process. Colorado.gov approves content layout determined by the agency prior to the next step in the process.

13. Present the Site Mock up

- Colorado.gov presents a prototype, or model, of the site. This provides an opportunity for both parties to identify any system design flaws prior to development initiation.

This is a sign-off step in the process. The agency must approve of the content categorization mock-up prior to the first step of site creation.

14. Launch the Base Template Site within CMS

- Site development commences using a base template for the design.

15. Customize Navigation and Content

- Depending on navigation and page types, the complexity of this step varies. Comprehension and scope of this variable is surveyed during the site mock up presentation.

16. Add Content

- Colorado.gov and the Agency work together to execute this step as it can be the most time consuming.
- Colorado.gov releases the site into the Training environment at the Colorado.gov offices and trains the Agency content contributors on adding content to the site.

17. Unit and Load Test on the Agency's Management Site

- Colorado.gov pushes the site into the Management environment where agency content contributors begin inserting content.
- Colorado.gov performs another round of unit testing and runs a load test against the system to assure the content loads acceptably.

18. Perform Acceptance Testing

- Based on both random usage and pre-determined test scripts (co-authored by the agency and Colorado.gov), Agency users test the site for performance and accuracy.

This is a sign-off step in the process. In order to begin the publishing cycle, the agency must sign off on the site.

19. Documentation and Explanation of Publishing Schedules

- Colorado.gov has a pre-determined publishing cycle for site pushes to the Delivery environment. Initial new Web site deployment is system intensive, so it must be planned appropriately.
- Content changes after the system is published are explained and documented. However, content changes may be pushed by the agency at any time after the site is delivered.

20. Deploy the New Site to the Live Environment

- Colorado.gov uses an internal process for deploying Web sites to the live environment. A contingency plan is documented in case of a system issue preventing an accurate rollout of the new site.
- Colorado.gov and the Agency verify the site with another round of testing.

21. Market the New Web Site

- The Agency and Colorado.gov marketing staff must announce the release of the new Web site.

22. Review of Site Release

- Colorado.gov and the Agency reflect on the project and identify positive outcomes and situations where process and execution can be improved moving forward.

5 Conclusion

This manual was developed to provide an overview of CMS. Please review each section carefully to gain a greater understanding of the overall system. More detailed information is available upon request.

Contact Information

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6 Appendix A - Sample Project Request

Below is a sample three-page Project Request form.

Project Request Form

Request #: _____

Request taken by _____

Date _____

Requestor _____

Title _____

Department _____

EGE Present? _____

Division _____

Project Name _____

Project Type Read Read/Write E-commerce Website

Application short description:

Application detailed description

Department back end description

Perceived department/customer benefit

Security concerns

Status:

Date:

Notes:

7 Appendix B – Sample Work Order

Below is a sample three-page Work Order.

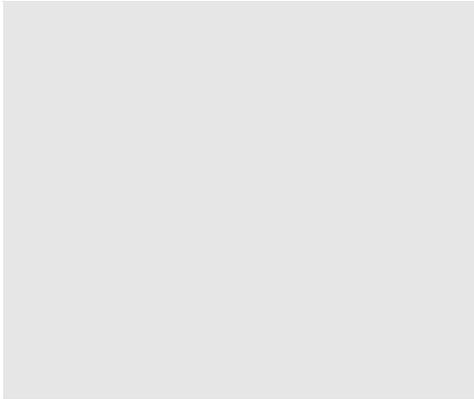
<<Project Name>> Work Order

Tacking Number: <<Agency Acronym-XXX>>

Date: Month dd, yyyy

Department:	<<Department Name>>
Division:	<<Division Name>>
Project Name:	<<??>>
Description of Work:	<<Description>>
Project Impact on Infrastructure:	<< Specific Description of expected impact to agency and portal infrastructure>>
Security:	<< Specific Description of expected security issues to agency and portal systems>>
Service Deliverables:	<<Line Item list of deliverables>>
Software Deliverables:	The website will be delivered to SIPA for hosting and maintenance on portal servers.
Hardware Deliverables:	<<Line Item list of deliverables>>
Other Deliverables:	<<Line Item list of deliverables>>
Development Schedule:	<p>Data Gathering & Prototyping: Approximately <<XX>> weeks The work order will be approved by the department and SIPA.</p> <p>Development Planning & Coding: Approximately <<XX>> weeks</p> <p>Testing: Approximately <<XX>> weeks</p> <p>Implementation: Approximately <<XX>> weeks: this will include a press release and possible press event.</p>

	<i>During the development process, it is common for unforeseen delays to occur. Colorado.gov will notify the department and SIPA immediately of any changes in projected dates. <<Agency Acronym>> will notify Colorado.gov and SIPA of any changes in their ability to assist in this project.</i>
Statutory Fee Collected on behalf of <<Agency Acronym>>:	<<fee amounts>>
Remittance Provisions:	<<typically: "When funds for transactions are settled.">>
Fee Collected on Behalf of Portal:	<<fee amounts>>
Colorado.gov Project Manager:	John E. Thomas Director of E-Government Services 303.534.3468 x102 jthomas@www.colorado.gov
<<Agency Acronym>> Project Manager:	<<Department/Agency Project Manager Information>>
Customer Support (Help Desk):	Colorado.gov will provide customer support for this service through the help desk for the State's E-Government services. Colorado.gov will pass issues and policy questions beyond the scope of the service to <<name of department project manager>>.
Additional Terms:	<p><<This section may contain any mutually agreed to caveats associated with the project, such as those listed below..>></p> <p>Colorado.gov agrees (and is contractually bound) to follow all confidentiality requirements set by <<Agency Acronym>>.</p> <p>Colorado.gov will not charge <<Agency Acronym>> for development, maintenance or customer support of this service.</p> <p>Colorado.gov will be responsible for the maintenance of the delivered code. The code will reside on the SIPA infrastructure housed at 690 Kipling in the state's data center.</p> <p>Colorado.gov will follow the Business Process Model described in the Colorado.gov Business Plan in order to facilitate the delivery of this project.</p> <p><<Agency Acronym>> must give Colorado.gov a reasonable amount of time to update and support this service when changes are made or requested.</p> <p>This Appendix is a supplement to, and subject to the terms and conditions of, the Eligible Government Entity Agreement between the State Internet Portal Authority (SIPA) and <<Agency Acronym>>.</p> <p>This service is being developed as an enhancement to the State's portal known as Colorado.gov. All promotion of this service will be</p>



done using Colorado.gov as the access point. <<Agency Acronym>> will work in coordination with SIPA and Colorado.gov on press releases, events, and promotions of this service.

<<Agency Acronym>> acknowledges that Colorado.gov exercises no censorship or control over content furnished by <<Agency Acronym>> to Colorado.gov for this website; that this website will be built by Colorado.gov in accordance with the direction from and with the purpose to achieve the functionality requested by, <<Agency Acronym>>; and that <<Agency Acronym>> will be required to sign a statement that the website has achieved such purposes as built, before Colorado.gov deploys the website on the State's portal.

Gregg Rippey, Executive Director
Statewide Internet Portal Authority

Date

<<Department Signer, Title>>
<<Department Name>>

Date

Rich Olsen, General Manager
Colorado.gov

Date

8 Appendix C – Prioritization & Queue Management Process

The following diagram details how projects are prioritized and managed.

