



# **Student Financial Aid Content Management Rollout**



## Table of Contents

- 1. Overview ..... 1**
- 2. Rollout Steps ..... 1**
  - 2.1 Intranet Rollout..... 1**
    - 2.1.1 Fill out Server Access Forms for the TeamSite server.....3**
    - 2.1.2 Submit Server Access Forms to the SFA Security Officer.....3**
    - 2.1.3 Create Intranet TeamSite User Ids.....3**
    - 2.1.4 Create Intranet Branch Structure .....3**
    - 2.1.5 Create Workareas for the Intranet Content Managers and developers .....3**
    - 2.1.6 Set-up Workflows and Templates for the Intranet .....4**
    - 2.1.7 Configure OpenDeploy file for deployment of Intranet.....4**
    - 2.1.8 Stop Intranet production updates in HP environment .....4**
    - 2.1.9 Freeze Intranet site development in Sun environment .....4**
    - 2.1.10 Compress Intranet Site .....4**
    - 2.1.11 Send Intranet archive file via FTP to the TeamSite server.....5**
    - 2.1.12 Load Intranet site into TeamSite .....5**
    - 2.1.13 Make sure Intranet is virtualized in all TeamSite workareas .....5**
    - 2.1.14 OpenDeploy Intranet site to development environment .....5**
    - 2.1.15 OpenDeploy Intranet site to the test environment .....5**
    - 2.1.16 Test Intranet in the test environment .....6**
    - 2.1.17 Migrate code fixes and re-test.....6**
    - 2.1.18 OpenDeploy Intranet content to staging.....6**
    - 2.1.19 Verify that Intranet site in staging environment is functional.....6**
    - 2.1.20 OpenDeploy Intranet site to production environment.....6**
  - 2.2 IFAP/Schools Portal Rollout..... 6**
    - 2.2.1 Fill out Server Access Forms for the TeamSite Server.....7**
    - 2.2.2 Submit Server Access Forms to the SFA Security Officer.....8**
    - 2.2.3 Create TeamSite User Ids for IFAP/Schools Portal .....8**
    - 2.2.4 Create IFAP/School Portal branch within TeamSite .....8**
    - 2.2.5 Create workareas for the IFAP/Schools Portal .....8**
    - 2.2.6 Set-up Workflows for the IFAP/Schools Portal Content Management Process.....9**
    - 2.2.7 Create directory structure for each IFAP and School Portal publication type.....9**
    - 2.2.8 Build and Test templates for each IFAP and School Portal publication type.....9**
    - 2.2.9 Configure OpenDeploy for IFAP/School Portal.....11**
    - 2.2.10 Configure DataDeploy for IFAP/School Portal .....11**



**SFA INTRANET IPT**

**Content Management**

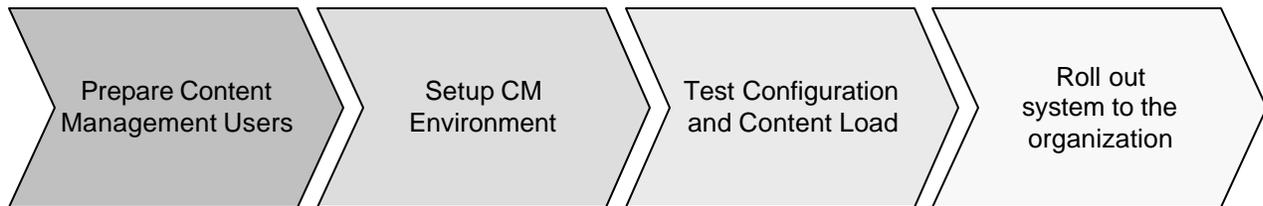
**2.2.11 Deploy Content Created via Templates to Integration Test.....11**  
**2.2.12 Verify that information is correctly posted to IFAP and School Portals in staging .....12**  
**2.2.13 Train IFAP Content Managers and Contributors .....12**  
**2.2.14 Assist IFAP/Schools Portal Team for Production Deployment.....12**



## 1. Overview

The purpose of this document is to outline the steps for rolling out Interwoven's TeamSite Content Management tool at the Student Financial Assistance Office (SFA). This document discusses the initial registration of Intranet, IFAP and Schools Portal within TeamSite.

The rollout occurs in four different phases, which are shown below, and described in detail during the following sections.



Content Management Rollout

## 2. Rollout Steps

The procedures listed below outlines the general plan for rolling out Interwoven's Content Management Solution to support Intranet and IFAP/ School Portals applications. Sections 2.1 and 2.2 cover the detailed rollout sequence for Intranet and IFAP/School Portal sites respectively.

### 2.1 Intranet Rollout

The sections below highlight the steps taken for registering SFA Intranet Site within TeamSite. The sections do not cover any Interwoven TeamSite configuration specifics. For configuration details, please refer to the Interwoven Configuration deliverable. The table below lists each step taken in the Intranet Content Management Rollout and the party responsible for each step.

Step	Description	Responsibility
1	Fill out Server Access Forms for the TeamSite Server: su35e4 – Unix Ids created should belong to the External Group on su35e4	SFA
2	Submit Server Access Forms to the SFA Security Officer for approval – Forms are transferred to the Virtual Data Center if approved	SFA



**SFA INTRANET IPT**

**Content Management**

3	Create TeamSite User Ids for Content Managers and developers	VDC
4	Create branch Structure under “main” branch within TeamSite	CM Dev.
5	Create TeamSite workareas for the Content Managers, Contributors and developers	CM Dev
6	Set-up TeamSite workflows and templates for the Content Management Process	CM Dev
7	Configure deployment files (OpenDeploy and DataDeploy) for content deployment to the following environments: development, test, staging and production	CM Dev
8	Freeze any additional development	SFA
9	Stop production updates in HP environment (Intranet Only)	SFA
10	Compress site (Intranet Only)	SFA
11	Send archive file via FTP to the TeamSite server (su35e4)	SFA
12	Load site into TeamSite (Intranet Only)	CM Dev
13	Make sure Intranet is virtualized in all TeamSite workareas (Intranet Only)	CM Dev
14	Deploy content to development environment	CM Dev
15	Deploy content to the test environment	CM Dev
16	Test new deployed content in the test environment	App Dev
17	Migrate code fixes to the test environment and retest	App Dev/CM Dev
18	Deploy fixes that have been signed-off to staging environment	CM Dev
19	Verify staged content is functional	App Dev
20	Deploy content to production environment	CM Dev

CM Dev – Content Management Development Team

App Dev – Application Development Team



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**SFA INTRANET IPT****Content Management****2.1.1 Fill out Server Access Forms for the TeamSite server**

Every TeamSite user needs an user account on su35e4 environment before the Content Management Team creates their Interwoven IDs. In order to obtain the unix accounts, each content manager/contributor should fill out the SFA security forms requesting access to the su35e4, the TeamSite server. In addition, the accounts created should belong to the external group under /etc/group on su35e4.

**2.1.2 Submit Server Access Forms to the SFA Security Officer**

Security forms are forwarded to the SFA Security Officer. Once approved, the forms are transferred to the Virtual Data Center. A system administrator creates the unix accounts and communicates the unix Ids and temporary passwords to the TeamSite users.

**2.1.3 Create Intranet TeamSite User Ids**

The Content Management Team creates the Interwoven Ids for the Intranet Content Managers and Developers. There are four ID files located in “/iw-home/conf/roles”: admin.uid, author.uid, editor.uid and master.uid. A TeamSite user is added the file that corresponds to his or her role. For example, a Content Manager will be added to the admin.uid while somebody with an author role will be added to the “author.uid” file.

**2.1.4 Create Intranet Branch Structure**

The Content Management Team creates the Intranet branch structure based on the Intranet development process. The load workarea is where the Intranet site gets loaded into TeamSite.

**2.1.5 Create Workareas for the Intranet Content Managers and developers**

Workareas are created for each Intranet Content Manager. Each Intranet developer gets his or her own workarea underneath his corresponding Content Manager.



### **2.1.6 Set-up Workflows and Templates for the Intranet**

Based on the client requirements, four templates were developed: “Press Releases”, “Inside SFA”, “Transformation News” and “Fact/Info Sheets”. These four templates are located in the SFA communication section of the site and follow the Intranet workflow design. For detailed information on the workflow design, please refer to deliverable #9.3.3: Interwoven Content Shop Process.

### **2.1.7 Configure OpenDeploy file for deployment of Intranet**

The Intranet site needs to be “opendeployed” to the appropriate environment. In order to do so, the opendeploy files need to be configured on both the TeamSite server and the receiving servers. The receiving servers include the Intranet production server: su35e14 and the Intranet development server:su35e3.

Note: Detailed information on the configuration of these files is provided in deliverable #9.3.4: Interwoven Content Management Configuration.

### **2.1.8 Stop Intranet production updates in HP environment**

Currently, the Intranet production copy resides in an HP environment. To move the Intranet site from the HP environment to the standard SFA Sun Architecture, a snapshot of the production copy is loaded into TeamSite. The loaded version is then later deployed to the development environment to create the baseline for any further development.

### **2.1.9 Freeze Intranet site development in Sun environment**

There needs to be a “freezing period” whereby no new content is added to the Intranet development environment. This ensures that an accurate snapshot of the Intranet gets deployed to the test, staging and production environment.

### **2.1.10 Compress Intranet Site**

The Webmaster compresses the production copy of the Intranet which resides in the HP environment (see 2.1.7) for transfer to the TeamSite server.



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## SFA INTRANET IPT

## Content Management

### 2.1.11 Send Intranet archive file via FTP to the TeamSite server

The Webmaster sends the archive file via FTP to the TeamSite server “su35e4”. The file is then placed in the following directory: /export/home/ts/sfa.

### 2.1.12 Load Intranet site into TeamSite

The Content Management Team extracts the Intranet site and place in “/iwmnt/default/main/int/WORKAREA/load” executing the following command: `jar -xf intranet.jar`.

### 2.1.13 Make sure Intranet is virtualized in all TeamSite workareas

After loading the Intranet site into the load workarea, it must be fully functional within TeamSite. All workareas should be able to access a virtual copy of the site. A simple virtualization test is to click on the index page and navigate throughout the entire site (which still remains within TeamSite at this particular point). If the website cannot be virtualized the Interwoven proxy server must be remapped accordingly.

### 2.1.14 OpenDeploy Intranet site to development environment

The OpenDeploy configuration is complete (2.1.7) so the Intranet site can be “opendeployed” to the development environment by executing the following command from /iw-home/opendeploy/bin:

```
#iwdeploy -V 1 -fs/iw-home/opendeploy/conf/iw.odclient.int.cfg intranet
```

where iw.odclient.int.cfg represents the Intranet opendeploy configuration file and points to the “/www/dev/intranet/htdocs” directory.

Note: See the Interwoven Configuration Deliverable for more details on how to configure the deployment files.

### 2.1.15 OpenDeploy Intranet site to the test environment

After a successful deployment to the development environment and if that particular version of the site is ready for testing, an opendeploy to the test environment is necessary. To opendeploy to test, the same procedure as in



## **SFA INTRANET IPT**

## **Content Management**

2.1.14 is followed. The only difference is that the opendeploy configuration file `iw.odclient.int.cfg` points to test (`/www/tst/intranet`).

### **2.1.16 Test Intranet in the test environment**

After deploying the Intranet content to testing. The Testing Team proceeds with the testing of the site.

Please refer to the Testing Plan for more details about the scripts and the overall testing procedure.

### **2.1.17 Migrate code fixes and re-test**

Any code fixes needs to migrate to the test environment and re-tested.

### **2.1.18 OpenDeploy Intranet content to staging**

After completing the testing plan, the Intranet is opendeployed to staging. The deployment procedure is similar to 2.1.14 and 2.1.15 except that the opendeploy configuration file points to staging (`/www/stg/intranet`).

Please refer to the Interwoven Configuration deliverable for the details on all configuration files.

### **2.1.19 Verify that Intranet site in staging environment is functional**

The Testing Team performs another testing cycle to ensure that the version of the Intranet site in staging is ready for production.

Please refer to the Testing Plan for details about the testing scripts.

### **2.1.20 OpenDeploy Intranet site to production environment**

The Intranet is “opendeployed” to production after the business stakeholders review the version in staging.

## **2.2 IFAP/Schools Portal Rollout**

The IFAP/Schools Portal Content Management efforts are template-driven. The information generated from these templates are posted to the IFAP and School Portals sites



**SFA INTRANET IPT**

**Content Management**

via a combination of OpenDeploy and DataDeploy services. This leads to a slightly different rollout sequence. The table below lists each step taken in the Intranet Content Management Rollout and the party responsible for each step.

Step	Description	Responsibility
1	Fill out Server Access Forms for the TeamSite Server	SFA
2	Submit Server Access Forms to the SFA Security Officer	SFA
3	Create TeamSite User Ids for IFAP/Schools Portal	CSC
4	Create IFAP/Schools Portal branch within TeamSite	CM Dev
5	Create workareas for the IFAP/Schools Portal	CM Dev
6	Set-up Workflows for the IFAP/Schools Portal Content Management Process	CM Dev
7	Create directory structure for each IFAP and Schools Portal publication type	CM Dev
8	Build and test templates for each IFAP and schools Portal publication type	CM Dev
9	Configure Opendeploy for IFAP/Schools Portal	CM Dev
10	Configure DataDeploy for IFAP/Schools Portal	CM Dev
11	Deploy Content Created via Templates to Integration Test	CM Dev
12	Verify that information is correctly posted to IFAP and Schools Portal in staging area	App Dev
13	Train IFAP Content Managers and Contributors	CM Dev
14	Assist IFAP/Schools Portal Team for Production Deployment	CM Dev

CM Dev – Content Management Development Team

App Dev – Application Development Team

**2.2.1 Fill out Server Access Forms for the TeamSite Server**

Every TeamSite user needs an user account on su35e4 environment before the Content Management Team creates their Interwoven IDs. In order to obtain the



## **SFA INTRANET IPT**

## **Content Management**

unix accounts, each content manager/contributor should fill out the SFA security forms requesting access to the su35e4, the TeamSite server. In addition, the accounts created should belong to the external group under /etc/group on su35e4.

### **2.2.2 Submit Server Access Forms to the SFA Security Officer**

Security forms are forwarded to the SFA Security Officer. Once approved, the forms are transferred to the Virtual Data Center. A system administrator creates the unix accounts and communicates the unix Ids and temporary passwords to the TeamSite users.

### **2.2.3 Create TeamSite User Ids for IFAP/Schools Portal**

The Content Management Team creates the Interwoven Ids for the IFAP/Schools Portal Content Managers and Content Contributors. There are four ID files located in “/iw-home/conf/roles”: admin.uid, author.uid, editor.uid and master.uid. A TeamSite user is added the file that corresponds to his or her role. For example, the IFAP Content Manager will be added to the admin.uid while the content contributors with author roles and editor roles will be added to the author.uid and editor.uid files respectively.

### **2.2.4 Create IFAP/School Portal branch within TeamSite**

The Content Management Team creates an “ifap” branch which host both IFAP and School Portals Content Management Process. The “validate” workarea is where all the IFAP/Schools Portal content and templates reside.

Please refer to the Content Management Training for IFAP/School Portal for details on how to create branches within TeamSite.

### **2.2.5 Create workareas for the IFAP/Schools Portal**

Workareas are created for each IFAP/School Portal Content Manager. Each IFAP/School Portal Content Contributor possess his or her own workarea where individual work can be performed.

Please refer to the Content Management Training for IFAP/School Portal for details on how to create workareas.



**SFA INTRANET IPT**

**Content Management**

**2.2.6 Set-up Workflows for the IFAP/Schools Portal Content Management Process**

Workflows to support the IFAP/School Portal Content Management Process have been developed.

Please refer to the SFA Workflow Design deliverable for details on the IFAP/School Portal workflows

**2.2.7 Create directory structure for each IFAP and School Portal publication type**

A directory structure that matches up each IFAP and School Portal publication type was created under the “ifap” branch under main (See 2.2.4).

**2.2.8 Build and Test templates for each IFAP and School Portal publication type**

Thirty-five templates were developed for all IFAP publication types. Four School Portal templates were developed to develop the Calendar, Headlines, NPRM and SFA Links on the School Portal site.

See the table below for a listing of IFAP publication types and their corresponding templates

<b>Publication Name</b>	<b>Template Category</b>	<b>Template Name</b>
Accrediting Agency	ifap	aagencies
Audit Guides	ifap	aguides
Blue Books	ifap	bbooks
Campus-Based Program Materials	ifap	cbpmateirals
Conferences and Presentations	ifap	presentations
Counselor's Handbooks	ifap	chandbooks
Dear Partner, Colleague Letters	ifap	dpcletters
Default Rate Materials	ifap	drmaterials
Direct Loan Bulletins	loan	dlbulletins



**SFA INTRANET IPT**

**Content Management**

Direct Loan Fact Sheets	loan	dlfsheets
Direct Loan Newsletters	loan	dlnewsletters
Direct Loan Pamphlets	loan	dlpamphlets
Direct Loan School Guides	loan	dlsguides
Direct Loan Technical Reference	loan	dltreference
Draft SFA Publications For Review and Comment	ifap	draftsfapubs
EDConnect for windows users' guide	ifap	edeconnectwug
EDE Technical References	ifap	edereferences
EFC Formula Information	ifap	efcinformation
Electronic Announcements	ifap	eannouncements
FAFSAs and Renewal FAFSAs	ifap	fafsa
Federal Registers	ifap	fregisters
FFEL Special Allowance Rates	ifap	ffelspebrates
FFEL Variable Interest Rates	ifap	ffelvarrates
FWS Resource Guide	ifap	fwsguide
IPOS Program Review Guidance	ifap	iposguidance
NSLDS Reference Materials	ifap	nsldsmaterials
Pell Grant (RFMS) Process	ifap	pgrfmsprocess
Policy Bulletins	ifap	pbulletins
Reauthorization	ifap	reauthorization
Regulations Compilations	ifap	regcomps
SAR and ISIR Reference Materials	ifap	sarmaterials
SFA Training Depot	ifap	sfadepot
SSCR User's Guides	ifap	sscrguide
Student Financial Aid Handbooks	ifap	sfahandbooks



Verification Guides and Worksheets	ifap	vgworksheets
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### 2.2.9 Configure OpenDeploy for IFAP/School Portal

The template-generated HTML files for IFAP and School Portal sites needs to be “opendeployed” to the appropriate environment. In order to do so, the opendeploy files need to be configured on both the TeamSite server and the receiving servers. The receiving servers include the IFAP/School Portal production servers: su35e8, su35e10 and su35e10 . The IFAP/School Portal development serve is su35e3.

Note: Detailed information on the configuration of these files is provided in the Interwoven Configuration Deliverable

### 2.2.10 Configure DataDeploy for IFAP/School Portal

While OpenDeploy deploys files from a directory from server to another, DataDeploy pushes content to a database. IFAP and School Portal DataDeploy files (“dd.ifap.cfg” and “dd.sp.cfg”) are configured to push the metadata captured in the templates to the appropriate databases. For example, the IFAP DataDeploy file points to “< database db=”hpv2:1627:ifap” ...> “. “ifap represents” the IFAP database, “1627” is the port use for the database connection, hpv2 is the HP server hosting the database server.

### 2.2.11 Deploy Content Created via Templates to Integration Test

The content generated from the templates needs to push to the integration test database (“< database db=”hpv1:1624:ifaps” ...> “. “ifaps” represents the IFAP/School Portal integration test database. The following commands need to be executed from the “/iw-home/opendeploy/bin” directory:

```
#iwdd.ipl cfg=../conf/dd.ifap.cfg deployment="ifap" mytable="ifaps" for IFAP deployment (“ifap” can be changed to any thirty-five IFAP templates).
```

```
#iwdd.ipl cfg=../conf/dd.sp.cfg deployment="calendar" mytable="calendar" for School Portal specific deployment. (“calendar” can be replaced by “nprm”, “sfalinks” and “headlines” templates depending on which template is deployed)
```



**SFA INTRANET IPT**

**Content Management**

**2.2.12 Verify that information is correctly posted to IFAP and School Portals in staging**

Make sure that both content types have been properly deployed to the right area in staging. The template-generated HTML files for both IFAP and School Portal should be in the right directories in staging. The metadata information should be posted to the IFAP/School Portal database.

The Testing Team runs through their testing scripts to ensure that content is where it needs to be.

Please refer to the IFAP/School Portal Testing Plan for detailed information about the testing procedure.

**2.2.13 Train IFAP Content Managers and Contributors**

IFAP Content Managers and Contributors are trained on TeamSite basics, the content management process for IFAP and School Portal applications. The Training Team designed a training guide.

Please refer to deliverable 9.3.6 “Content Management Training for IFAP/Schools Portal” for more training details

**2.2.14 Assist IFAP/Schools Portal Team for Production Deployment**

After training the IFAP/Schools Portal Team, the Content Management Team supported the initial deployment of IFAP and Schools Portal templates.