



# **Student Financial Aid**

## **Intranet Content Management**

### **High-Level Process Design**



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## 1. Document Control

### 1.1 Document Revision History

Version	Modifications	Date	Author

### 1.2 Document Information

Original Authors: Samuel Epee-Bounya

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### 1.3 Distribution

Distribution :	
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### 1.4 Document Approvals

<b>Created By:</b>	Name: <u>Samuel Epee-Bounya</u> Date: _____ Signature: _____
<b>Approval:</b>	Name: <u>Claude Boyks</u> Date: _____ Signature: _____
<b>Sign-Off:</b>	Name: _____ Date: _____ Signature: _____

## 2. Introduction

SFA is in the process of designing an Intranet that will enhance overall knowledge and communications across the various SFA Channels<sup>1</sup>. The Content Management process flow contained herein was specifically designed for SFA and will benefit the overall organization by eventually allowing non-technical users to be contributors of content to the SFA Intranet.

### 2.1 Audience

This document targets all parties that are part of the SFA Content Management process. At a minimum, this effort will involve the various Channels; e.g. Schools, Students, Financial Partners, CFO, CIO, Analysis, SFA University, HR, etc.

### 2.2 Assumptions

This document entails a high-level design and is drafted based on the following assumptions:

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<sup>1</sup> Please note that within the scope of the SFA Intranet that the term “channels” refers to any group of SFA employees that would have their own home page on the SFA Intranet; e.g. CIO, CFO, Schools, Financial Partners, Students, etc.



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- *This version of the Content Management Process assumes static content types for placement into the SFA Intranet. These content types will include news updates, organization charts, white papers, applications, forms, policies, and procedures and other static components that will constitute the first release of SFA Intranet.*
- *We assume that there will be a need to update various content types on a frequent basis for the SFA Intranet.*
- *For SFA Content workflow, the Webmaster's Team (or equivalent) will have oversight authority over the team that will be responsible for staging content onto the production environment; it is not necessary for the Webmaster to personally move content from the staging environment to the production environment.*
- *Interwoven's TeamSite Content Management Tool will not be used to manage content for SFA Intranet Release 1<sup>2</sup>, but will be utilized for future SFA Intranet releases.*
- *The Content Management Process will be flexible enough to include dynamic components that will constitute future SFA Intranet releases.*
- *The initial volume of static content to the Content Shop is expected to be high; but will decrease as one-time (non-recurring) data is deployed and processes/resources are streamlined.*

### 3. Proposed Content Management Process for SFA

#### 3.1 Process Overview

The proposed Content Management process flow for SFA consists of four main processes:

- *The Channel Process* develops requirements for any SFA Intranet changes. The focus within this process is on requirements definition and confirmation. This includes idea development, review of existing contents and identification of requirements for content creation, modification and deletion.
- *The Content Shop Process* includes: the creation of content for SFA Intranet resources; modification of out-of-date product content; translation of content; deletion of

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<sup>2</sup> Scheduled for release on 4.15.00 as of 4.1.00



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obsolete content; and staging updated SFA Intranet to staging platform for preview and quality check. The focus in this phase is on what is traditionally known at the creation, translation and staging processes.

- The *SFA CIO/VDC Process* aims at the final level of approval for staged SFA Intranet content; when authorization for this content is obtained then this process will package the content along with any other authorized content for planned deployment to the SFA Intranet production environment. The various processes within this phase include authorization, packaging, deployment, and a notification to the Content Owners/Managers requesting verification of the deployed Intranet pages. This phase will involve the designated Webmaster along with a staff of supporting technical resources.
- The *Management and Administration Process* provides management of the repository of content information. This includes the receipt and storage of content along with standard Intranet service features such a disaster recovery, care and feeding, upgrade/maintenance management, providing levels of service as outlined in any Service Level Agreements, etc. pertaining to the SFA Intranet.

On the next page is the SFA Content Management Logical View diagram depicting the four high-level SFA Content Management processes and their corresponding activities. It also demonstrates the interaction and dependencies between different activities.

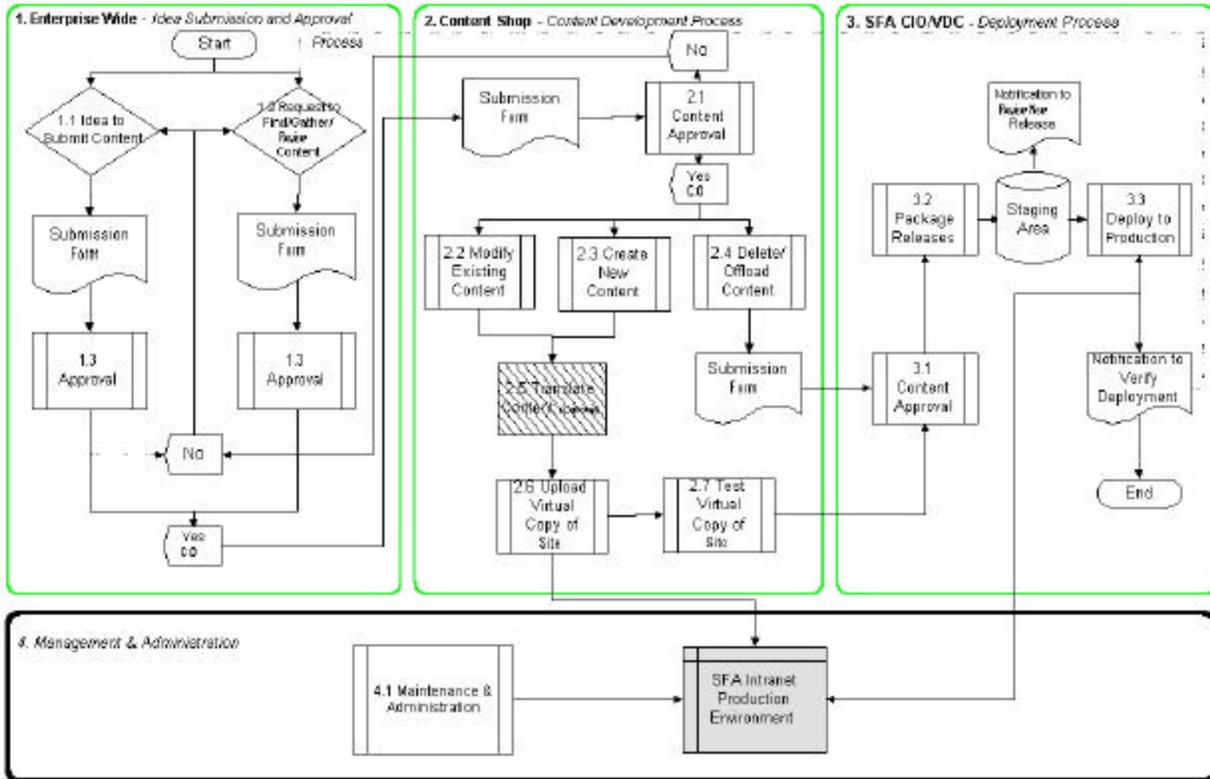
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Figure 1: SFA Content Management Logical View



3.2 Process Flow Timeline

The following sections summarize the existing Content Management data process flow and the proposed deployment timeline. The initial proposed deployment timeline for static content-types will be a 3-day cycle. This figure accounts for the expected initial high-volume of content to be deployed during the first phase of the SFA Intranet. The timeline is proposed here for SFA based on the following assumptions:

- *The proposed 3-day cycle is based upon static-HTML content comprising the content types that require posting to the SFA Intranet. Alternative content types; e.g. graphics, template design, etc. require specialized technical expertise and final output often is subjective in manner, therefore it is possible that such content types may take longer periods of time or require additional resources to be output to the SFA Intranet.*



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- *In order to establish an initial smooth process that will lead to accurate and efficient deployment of SFA static HTML data, we will initially deploy with a centralized “Content Shop” model which will centrally process all the channels requests for data deployment.*
- *Longer lead times are required until the appropriate mix of resources can be established and an overall process can be fine-tuned to the Channel requirements as well as the various content types, tools, and training needs of the SFA resources.*
- *An automated tool, Interwoven’s TeamSite, will be eventually be used to stage SFA Intranet information. It is expected that this will be implemented during the initial phases of the SFA Intranet; eventually contributing to a decrease in the overall process timeline.*
- *Other assumptions: There will be an expedited content submittal/removal process available to the Channels that may be used provided that the data meets specific priority criteria.*

Process, Activities, and Task Descriptions	DAY		
	1	2	3
1.1 – 1.3 Idea Submission and Endorsement Process	X		
2.1 – 2.5 Content Creation/Modification/Deletion		X	
2.6 Test Content		X	
3.1 Authorize Content			X
3.2 – 3.4 Deploy Content			X
4.1 Maintenance and Administration			X

The table below presents a summary of activities that are captured under the proposed initial 3-day cycle. Future cycles will compress static content HTML creation timeframes and may combine certain process ID’s.

Process ID	Activity Description	Responsible Party
1.1	Idea to submit content	• Content Contributor
1.2	Request to find/gather/prepare content	• Content Owner
1.3	Authorize Content (grammar/spell check)	• Content Approver
2.1	Submit Content to Content Shop	• Content Managers
2.2	Modify Content	• Content Shop
2.3	Create New Content	• Content Shop



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Process ID	Activity Description	Responsible Party
2.4	Delete/Offload Content	<ul style="list-style-type: none"> <li>Content Shop</li> </ul>
2.5	Translate Content	<ul style="list-style-type: none"> <li>Content Shop (optional)</li> </ul>
2.6	Upload Virtual Copy of Site	<ul style="list-style-type: none"> <li>Content Shop</li> </ul>
2.7	Test Virtual Copy of Site	<ul style="list-style-type: none"> <li>Content Shop</li> </ul>
3.1	Authorize Content (style guide, usability, accessibility guidelines)	<ul style="list-style-type: none"> <li>Content Approver</li> </ul>
3.2	Package Releases	<ul style="list-style-type: none"> <li>SFA CIO/VDC</li> </ul>
3.3	Deploy Content	<ul style="list-style-type: none"> <li>SFA CIO/VDC</li> </ul>
3.4	Verify Deployment	<ul style="list-style-type: none"> <li>SFA CIO/VDC</li> </ul>

The initial Content Management cycle time will assist in achieving a high-level of quality throughout the Content Management process while simultaneously reflecting the channel's demand for constant updating to the SFA Intranet.

### 3.3 Roles and Responsibilities

The table below demonstrates all the roles involved in successfully implementing the proposed Content Management process together with their main (in terms of the SFA Intranet) responsibilities. Please refer to the SFA Intranet Content Management User Roles and Mid-Level Workflow Processes for more information about the activities and tasks assigned to each role.

Roles	Responsibilities
<b>Content Contributor</b>	Any member of SFA who identifies, gathers, or develops an idea for new or existing content to be published on the Intranet
<b>Content Owner/Sponsor</b>	Content Owner/Sponsor functions as a champion accountable for what content is identified for contribution
<b>Content Manager</b>	<p>A Content Manager represents each channel and has the overall responsibility for monitoring and/or controlling the Content Management process. Additional responsibilities include:</p> <ul style="list-style-type: none"> <li>Manage Content Contributors within his or her</li> </ul>



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	<ul style="list-style-type: none"> <li>scope</li> <li>• Manage Content Owners within his or her scope</li> <li>• Review content items submitted by Content Contributors and ensure that they meet any channel requirements or standards</li> </ul>
<b>Content Developer/Producer</b>	<ul style="list-style-type: none"> <li>• Transfer raw data and information, such as hard copy text or electronic text into a standard format; e.g. simple HTML code, graphics, etc.</li> </ul>
<b>Subject Matter Expert (SME)</b>	<ul style="list-style-type: none"> <li>• Serves as a resource for Content Developers; e.g. Interwoven expert, web-publishing experts. Act in a consultant capacity to Content Developers providing accurate information and/or resources to Content Developers</li> </ul>
<b>Content Approver</b>	<ul style="list-style-type: none"> <li>• Oversee and perform review of specific content. Authorizes content after spell check and grammar review. Authorize content if it conforms to SFA style guide, usability and accessibility guidelines</li> </ul>
<b>Content Management Architect</b>	<ul style="list-style-type: none"> <li>• Design Content Management technical infrastructure and aligns efforts with the Development, Execution, and Operations environments</li> </ul>
<b>Content Operations Staff</b>	<ul style="list-style-type: none"> <li>• Oversee the day to day technical administration and maintenance of the Intranet</li> </ul>
<b>Content Support Staff</b>	<ul style="list-style-type: none"> <li>• Performs a variety of functions; documentation standards, and creates training for content users/developers</li> </ul>
<b>Steering Committee</b>	<ul style="list-style-type: none"> <li>• Team made up of stakeholders who coordinate the design, structure, and implementation for the Intranet content and applications</li> </ul>
<b>Web Master</b>	<ul style="list-style-type: none"> <li>• Heads-up content shop and oversees deployment of content to production</li> </ul>

**4. Content Status Flow and Status Tracking**

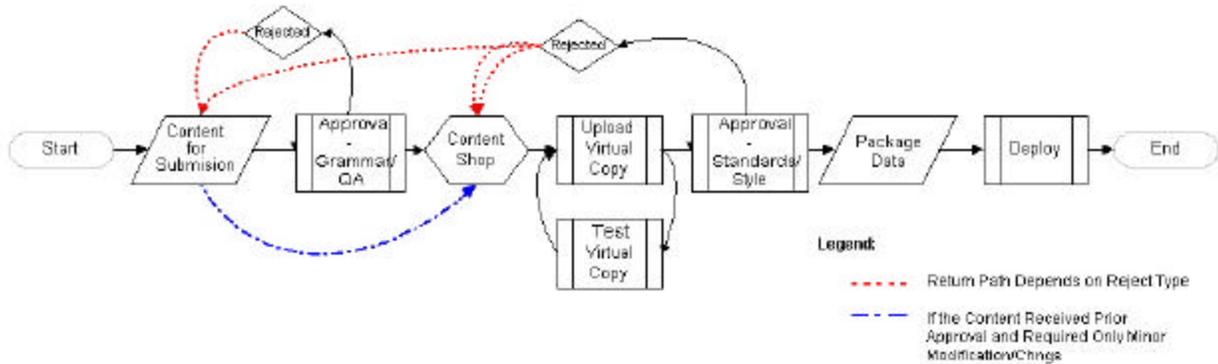
In order to keep track of content status during the lifecycle of SFA’s content deployment processes, a status tracking mechanism needs to be in place to define and keep track of all content. Please refer to Section 4.2 for a description of the Content Management tracking mechanism that will be employed in the SFA Intranet Content Management process.



### 4.1 Status Diagram and Status Transition

The diagram below features all the eight content statuses and their transition paths.

Figure 2: Content Statuses & Transition Paths



Entry criteria for next steps in the flow need to be fulfilled for content to move forward to the next status. For content materials that require no conversion, they can skip the “conversion complete” status and be staged on the development server directly

The following table lists all the transition status, corresponding process Ids, entry criteria and the parties responsible for the transition at that particular status. To adhere to the proposed SFA Content Management process lifecycle, transition status needs to be attained before the day shown in the “complete before” column.

No.	Transition Status	Process ID	Complete before	Entry Criteria for the Transition Status	Parties Involved
1.	Ready for Content Submission	1.1 - 1.3,	-	<ul style="list-style-type: none"> <li>Content Manager collects Content Forms (Add New/Modify) from Content Contributors and forwards them to Content Approver</li> </ul>	<ul style="list-style-type: none"> <li>Content Manager</li> </ul>



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No.	Transition Status	Process ID	Complete before	Entry Criteria for the Transition Status	Parties Involved
2.	Ready for Content Authorization	2.1	-	<ul style="list-style-type: none"> <li>Content Approver receives Content Forms</li> <li>Content Approver notifies Content Shop of request to add/modify/delete content</li> </ul>	<ul style="list-style-type: none"> <li>Content Approver</li> </ul>
3.	Upload and Test Virtual Copy	2.6	Day 1	<ul style="list-style-type: none"> <li>Content Shop converts documents into web ready format</li> <li>Content Shop integrates new content into virtual copy of web site</li> <li>Content Shop uploads virtual copy of web site</li> <li>Content Shop tests virtual copy of web site</li> </ul>	<ul style="list-style-type: none"> <li>Content Shop</li> </ul>
4.	Test failed	2.7	Day 2	<ul style="list-style-type: none"> <li>Content Shop tests entire SFA Intranet in staging area</li> <li>Test failed. Content Shop reports reasons for failure to Content Manager who in turn reports to Content Owner</li> </ul>	<ul style="list-style-type: none"> <li>Content Shop</li> <li>Content Manager</li> </ul>
5.	Test completed	2.7	Day 2	<ul style="list-style-type: none"> <li>Content Shop tests entire release in staging area</li> <li>Test Completed. Content Shop release as suitable for deployment</li> </ul>	<ul style="list-style-type: none"> <li>Content Shop</li> </ul>
6.	Approved	3.1	Day 2	<ul style="list-style-type: none"> <li>Content Approver reviews updated SFA Intranet</li> <li>Content Owner approves deployment</li> </ul>	<ul style="list-style-type: none"> <li>Content Approver</li> <li>Content Owner</li> </ul>
7.	Packaged	3.2	Day3	<ul style="list-style-type: none"> <li>Webmaster/VDC package releases for deployment to SFA Intranet</li> </ul>	<ul style="list-style-type: none"> <li>Webmaster /VDC</li> </ul>



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No.	Transition Status	Process ID	Complete before	Entry Criteria for the Transition Status	Parties Involved
8.	Rejected	3.1	Day 3	<ul style="list-style-type: none"> <li>Content Owner reviews new SFA Intranet verifies his/her requirements were met</li> <li>Content Owner rejects deployment with rejection reason.</li> </ul>	<ul style="list-style-type: none"> <li>Content Owner</li> </ul>
9.	Accepted	3.1	Day 3	<ul style="list-style-type: none"> <li>Content Owner reviews new SFA Intranet verifies his/her requirements were met</li> <li>Content Owner accepts deployment to production.</li> </ul>	<ul style="list-style-type: none"> <li>Content Owner</li> </ul>
9.	Deployed	3.3-3.4	Day 3	<ul style="list-style-type: none"> <li>Webmaster/VDC deploy packaged releases to production environment</li> <li>Deployment verification passed</li> </ul>	<ul style="list-style-type: none"> <li>Webmaster /VDC</li> <li>Content Owner</li> </ul>

**4.2 Status Tracking Tool**

In order to facilitate the co-ordination between parties and keep track of content status throughout the entire Content Management journey, Interwoven’s TeamSite product (TeamSite) will be used to provide a central repository for content status information by providing a tracking and reporting mechanism for add/modify requests. The workflow engine (built into Interwoven) allows content contributors/owners to remain updated throughout the Content Management entire lifecycle.

The following are required Content Management capabilities of the Interwoven TeamSite tool:

- *Allows one to compare and merge files and directories*
- *Provides code control, versioning and recovery capabilities*



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- *Provides locking mechanisms to prevent version duplication or accidental over-write*
- *Each Contributor and group has a private work area on the SFA Intranet where they can receive, edit, view, or contribute content*
- *Provides a staging area for integration and staging of work*
- *Versions of the SFA Intranet can be saved as editions and re-deployed as a whole or in pieces*
- *Facilitates rollback*
- *Contributors will raise a content change request with brief description of the changes,*
- *Status of the change request is defaulted to be new and can be changed to either one of the aforementioned status levels,*
- *Date and identity information will be captured within the tool whenever there is a change in status,*
- *User access level can be controlled; e.g. Contributors cannot authorize their own change requests, and*
- *Email (or other type of verifiable) notification will be distributed to the next resource responsible in the transition chain.*

## **5. Quality Assurance**

Quality must be emphasized throughout the Content Management process to ensure the delivery of information throughout the organization. As a result, significant considerations have been made during process design to guarantee that quality issues are addressed in every critical step within the Content Management framework. Quality checkpoints are arranged at different stages of the process and are summarized in the following table<sup>3</sup>:

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<sup>3</sup> Please refer to figure 1 within the Content Management User Roles and Responsibilities and Mid-Level Processes document



Task No.	Task Description	Quality Consideration
2.1	Review/Endorse Translated Material	Converted content are sent back to channel to verify content accuracy after translation.
2.2, 2.6	Modify Product Content, Compile Product Content	All SFA Intranet content are certified to be in its final status before translation is called for.
2.6	Upload Virtual Copy of Staged Content	The Content Shop verifies content after staging. SFA Intranet information should be certified as accurate after this point.
2.7	Test Content	The Content Shop is responsible for double checking staged SFA Intranet, making sure information staged do not conflict with any other existing product and conduct regression test on the entire SFA Intranet before deployment.
3.1	Authorize Content for deployment	Content Approver is responsible for authorizing content for deployment. This resource acts as a gatekeeper step before production release.
3.3	Verify Deployed Content	Verification is necessary to ensure all SFA Intranet functions resume after deployment.

In order to attain a high-level of quality, it is suggested that quality checkpoints should not be by-passed. It is also highly recommended to make use of the status tracking functionality of the Content Management tool (mentioned in *Section 4.2*) to keep track of content status and facilitate process progression throughout the content life cycle.



## 6. Content Management Process Deployment for SFA

### 6.1 SFA Content Management Intranet Project Team

Four teams are identified in the SFA who will be responsible for implementing the previously identified Content Management process. They are:

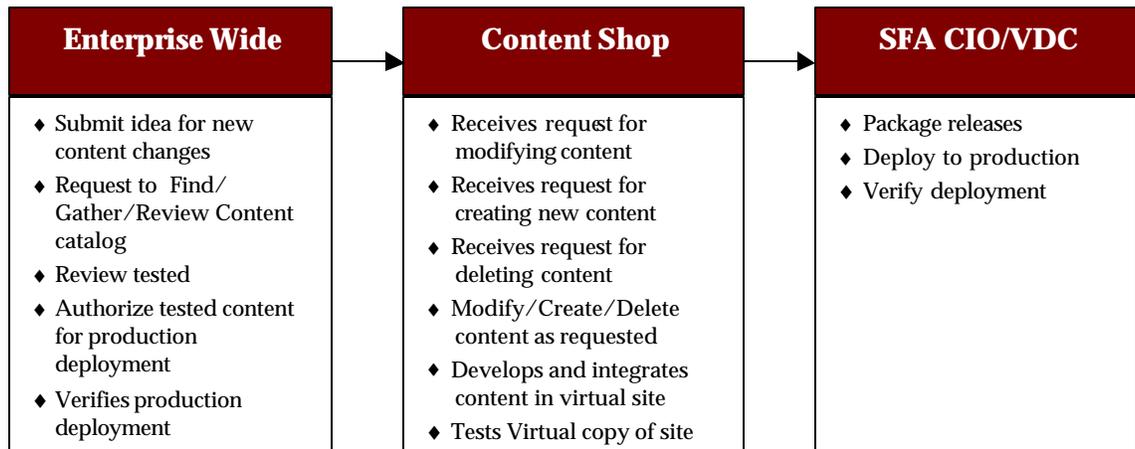
- *Content Management Project Team*
  - ◆ *Bill Bush, Will Handley, Carole Kuriatnikova, Claude Boyks, Samuel Epee-Bounya, Carolyn Casey*
- *Content Process Publication Team*
  - ◆ *NewTek*
- *SFA CIO Intranet Project Team (Content Manager)*
  - ◆ *TBD*
- *Webmaster Team (contact for deployment)*
  - ◆ *TBD*

The table below shows the roles taken up by each organization.

Content Organizations	Roles
Content Mgmt Project Team	<ul style="list-style-type: none"> <li>• Content Contributor</li> <li>• Content Owner</li> <li>• Content Manager</li> <li>• Content Approver</li> </ul>
Content Shop – Content Process Validation	<ul style="list-style-type: none"> <li>• Content Developer</li> <li>• Subject Matter Experts</li> <li>• Contractors</li> </ul>
SFA CIO/VDC–Content Deployment	<ul style="list-style-type: none"> <li>• Webmaster/CIO/VDC</li> <li>• Content Approver</li> </ul>



## 6.2 Summary Content Management Process Team Responsibilities





## **7. Reference Documents**

For further information about SFA Content Management flow, please refer to the following documents for details:

- *SFA Content Management Process Design*
- *SFA Content Preparation Standards (Usability, Accessibility and Style Guide standards)*
- *Interwoven (TeamSite and OpenDeploy) User and Reference Guides*