Student Financial Assistance

Intranet Content Management

User Roles and Mid–level Workflow Process

Table of Contents

1. Executive Summary 3

2. Introduction 3

3. Overview 3

4. User Roles 3

5. Access Groups 5

6. Proposed Design for Content Management Processes 9

6.1 Workflow 9

6.2 Add New Content Process 10

6.3 Modify Content Process 13

6.4 Expedited Add Content Process 21

6.5 Remove Content Process 24

6.6 Expedited Remove Content Process 25

1. Executive Summary

The purpose of this document is to provide SFA with a set functions and processes that should be in place for Content Management. This document includes the functional roles of the different parties involved in the Content Management process and the mid-level workflow and review processes.

2. Introduction

The Student Financial Aid (SFA) office is designing a Content Management process for SFA's Intranet Application. Based on preliminary input, we have identified some proposed Content Management user roles and designed a preliminary Content Management review and endorsement process. The primary goals of circulating this draft Content Management overview and review process are to:

- *Ensure all user functions have been identified*
- *Review the Content Management mid-level workflow processes described in this document*

3. Overview

Since the Intranet Application will be managed using Interwoven TeamSite. Interwoven's TeamSite (TeamSite) Content Management tools will be used in the development of processes and procedures for SFA employees. TeamSite is a web-based application that allows non-technical content contributors to manage the site's content including the creation, modification, deletion, categorization, review, editing, and staging of information.

This document provides a description of user roles, access groups, and workflows. In addition, preliminary users, access groups and workflows have been included. Based upon feedback these Content Management areas may be revised.

4. User Roles

A new user account is created for each TeamSite user including but not limited to Content Contributor, Content Owner, Content Developer, Content Manager, Content Reviewer and Content Approver. The user account information includes username, password, type of

user and the access groups to which the user belongs. User accounts are also maintained by the system administrator / webmaster (or other designed positions)

Content Management users will have access to information on the Intranet Application based upon their assigned User Role. The table below describes the user roles and provides a brief description.

Figure 1: User Roles

(NOTE: * indicates roles residing in the Content Shop)

User Role	Description
Content Contributor	Any member of SFA who produces or identifies information or an idea for publication on the SFA Intranet. Content Contributors may or may not be the Content Owners or authors and editors of the information.
Content Owner	Content Owner functions as a champion accountable for what content is identified for contribution and posted to the SFA Intranet. Content Owners drive the process of publishing content on the Intranet, which includes sponsoring, clarifying, and prioritization of Intranet content. Content Owners may also play additional Intranet roles, such as User and Content Contributor.
Content Manager	A Content Manager represents each Channel and has the overall responsibility for monitoring and ensuring the integrity of information throughout the Content Management process. Additional responsibilities include: • Manage Content Contributors within his or her channel. • Review content items submitted by Content Contributors and ensure that they meet any channel requirements or standards, and set priorities.
Content Approver	Oversee and perform review of specific content. Authorizes material to ensure all legal and confidentiality issues are addressed and / or resolved.
Steering Committee	The Committee is a cross-functional group of SFA team leaders who coordinate the overall design, structure, and implementation for the Intranet content and applications. They make decisions about the

	directors and general content areas to meet the overall site objectives.
***Content Developer/Producer**	Transfer raw data and information, such as hard copy text or electronic text into a standard format; e.g. simple HTML code, PDF, graphics, etc.
***Subject Matter Expert (SME)**	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.
***Content Management Architect**	Design Content Management technical infrastructure and aligns efforts with the Development, Execution, and Operations environments.
***Content Operations Staff**	Oversee the day-to-day technical administration and maintenance of the Intranet and ensure content is properly published, archived, and updated. Web Operations publishes authorized content onto the Intranet, in addition to maintaining Web directory structures and providing rollback capabilities for content published on the Intranet.
***Content Support Staff**	Performs a variety of functions; documentation standards, creates training for content users/developers, and provides Help Desk Support.
Web Master	Involved with overseeing all of the day-to-day administration and technical maintenance of the physical Intranet. (See Content Operations Staff)

5. Access Groups

Access groups determine users' privileges to content items. Members can access content in categories and subcategories associated with a specific access group. The system administrator/webmaster can create and maintain access groups to control publishing rights, add content publishers, manage profiles for their group, and grant access privileges. Users' access to content in a category is based on the highest level access privilege they have been granted for the parent category.

For example, the "Author" has View/Create/Modify privileges to the content located in her/his work area while the Content Approver has Admin (approve) privileges.

A Content Contributor has "Author" and "Edit" which file assignment capabilities while developers in the content shop have in addition to "Author" and "Edit", "Admin" and

"Master" capabilities. Figure 3 (next page) summarizes the capabilities in Interwoven TeamSite for each user.

Figure 2: Roles and Capabilities in TeamSite

	Author	Edit	Admin	Master
View file	✓	✓	✓	✓
Create, modify file	✓	✓	✓	✓
Assign file, delete file		✓	✓	✓
Submit file		✓	✓	✓
Update workarea		✓	✓	✓
Publish edition			✓	✓
Create, delete branch			✓	✓
Define hierarchy				✓

A Content Contributor has "Author" and "Edit" capabilities, while developers in the content shop have "Master" capabilities in addition to "Author" and "Edit". Figure 3 (next page) summarizes the capabilities in Interwoven TeamSite for each user defined in the Content Management workflow:

Figure 3: User Group Privileges

	Author	Edit	Admin	Master
Content Contributor	✓	✓		
Content Owner	✓	✓		
Content Manager	✓	✓		
Content Approver	✓	✓		
Content Shop	✓	✓	✓	✓
Webmaster	✓	✓	✓	✓

Below (Figure 4) is an example of Content Management Access Groups

Figure 4: Content Management Access Groups

	Content Types Used						
Channel/Shared Services	News \ Alerts	HR Services	Contacts	Documents and Forms	Training Info	FMS	Performance Plan
Students Channel				✓			
Schools Channel				✓			
Financial Partners Channel				✓			
COO							
CFO							
CIO							
Communications	✓						
Analysis				✓			✓
Human Resources		✓					
Acquisitions		✓					
SFA University					✓		

In this document, the term "Channels" refer to Students, Schools, Financial Partners, COO, CIO and CFO . Shared services include Acquisitions, Human Resources, Analysis, Communications, and SFA University.

6. Proposed Design for Mid-Level Content Management Processes

For the purposes of this application, Content Management consists of the creation, modification, and deletion of content items. The Content Management application will be used to manage content creation and maintenance.

6.1 Workflow

Review and authorization workflows will guide content that has been submitted for authorization to the appropriate Content Approvers and through the review process. The Workflows will be created and maintained by the system administrator/webmaster or other individuals based on current review processes for SFA Intranet Requirements. The content review process will allow for a serial authorization process. Each content item will be required to pass through the review and authorization process before its status is set to online and migrated to the production environment.

Note: For the Add New Content and Modify Content Process, there are two authorization steps. The first one is focused on grammar and spelling check. The second authorization process is put in place to ensure that the content items conform to SFA Styleguide, usability and accessibility guidelines.

The following are proposed Content Management workflows for SFA Intranet Application.

Figure 5: Content Management Workflows

Workflow Name	Description
Add New Content Process	Use to add new content to the site.
Modify Content Process	Use to modify content already on the site.
Expedited Add Content Process	Use to add content quickly.
Remove Content Process	Use to remove content items that are outdated or inaccurate.

Expedited Remove Content Process	Use to quickly remove content that is inaccurate, fraudulent, or offensive.

6.2 Add New Content Process

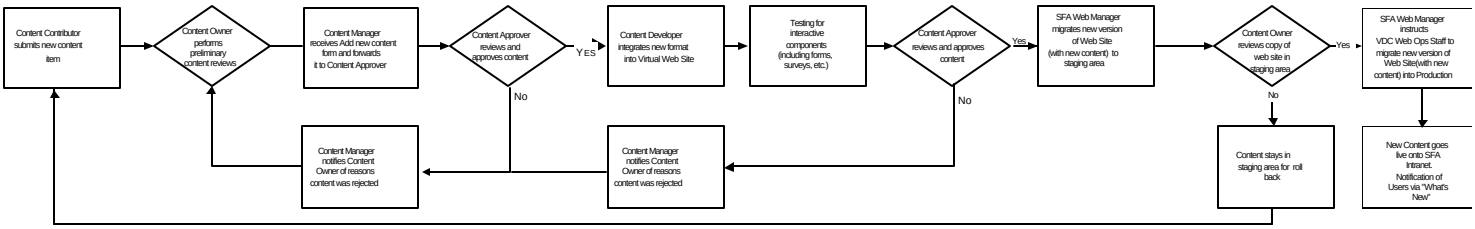
The Add New Content Process will be used to add new content items to the Intranet Application. An example of a new content item might be a document from a channel that has been previously available but not electronically. The Content Contributor would submit the proposed document to the Add New Content Process. Before being added to the SFA Intranet Application that item would need to go through the full content review and authorization process.

Although this process lists many potential review groups, it is possible that not all content items would go through all of these reviews. The particular review groups necessary for a given channel will depend on channel guidelines and the SFA Intranet Committee.

Diagram Located on the Following Page

The diagram below illustrates the Add New Content Process.

Figure 6: Add New Content Process Workflow



The table below describes each step of the workflow.

Figure 7: Add New Content Process Description

Step	Description
1	**Content Contributor submits new content item** The Content Contributor identifies information or has an idea that is relevant for posting on the Intranet. The Content Contributor submits content item to the Content Owner for review.
2	**Content Owner performs preliminary content reviews** The Content Owner receives an item and reviews the content to ensure that it is the right information going to the right audience at the right time and prioritizes for release across content assigns to a release.
3	**Content Manager receives form and forwards it to Content Approver** The Content Owner sends the pre-authorized content item to the Content Manager who maintains the integrity of the content item throughout the life cycle of submission process.
4	**Content Approver reviews and approves content item** The Content Approver checks TeamSite inbox or receives email notification that he/she has been assigned a content item to review grammar and spelling . The Content Approver reviews the content item through Interwoven. If the Content Approver authorizes the content item, the

	content item is submitted to the Content Developer. If the Content Approver does not authorize the content item, the Content Approver notifies the Content Manager of the reasons the content item was rejected.
5	**Content Developer integrates new format into Virtual Web Site** The content Developer checks TeamSite inbox or receives email notification that he has been assigned a content item to develop. Content Developer uses his/her web authoring tool of choice (e.g. Dreamweaver, Net Objects, FrontPage) to format documents to ensure a consistent look and feel once loaded on the Intranet. Developer will sometimes need to set up design templates, or archives, or format web pages of related content with lower tier navigation as needed.
6	**Test for interactive components** Test the integration of the interactive components that comprise the web page (including forms, surveys, etc.).
7	**Content Approver reviews and approves content** The Content Approver checks TeamSite inbox or receives email notification that he/she has been assigned a content item to review. The Content Approver conducts a review of the content item through Interwoven to ensure content conforms to SFA Styleguide, usability and accessibility guidelines . This review may include obtaining legal authorization to ensure that there is no breech of copyright or confidentiality involved with the publishing of information. If the Content Approver authorizes the content, the content is submitted to SFA Webmaster for deployment in staging area. If the Content Approver does not authorize the content, the Approver contacts the Content Manger who notifies the Content Owner with why the item was rejected. The content owner may then take changes or corrections and resubmit, as appropriate.
8	**SFA Webmaster migrates new version of Web Site (including new content) to staging area** The SFA Webmaster Team checks TeamSite inbox or receives email notification that they have been assigned a content item. The Team then loads the item on the site and moves to the staging area for review.
9	**Content Owner reviews copy of Web Site in staging area** The Content Owner ensures that the correct and timely information is

	maintained and is still accurate prior to going live on the site. The Content Owner checks TeamSite inbox or receives email notification that he/she has been assigned a content item to review. The Content Owner conducts a final review of the content item through SFA Interwoven. If the Content Owner authorizes the content, the content item status is set to online. If the Content Owner does not authorize the content item, the content stays in staging area for roll back to the Content Owner for rewrites or edits and resubmission for future releases.
10	**SFA Webmaster instructs VDC (Virtual Data Center) Web Operations Staff to migrate new version of the Web Site (including new content) into production** The Webmaster is responsible for ensuring that the authorized content goes live onto the SFA Intranet by working with the Web Operations Staff. In addition the Webmaster is tasked with providing consistent functionality and Web operating capability to the SFA organization.
11	**Notification of users and development team.** (e.g. "What's New")

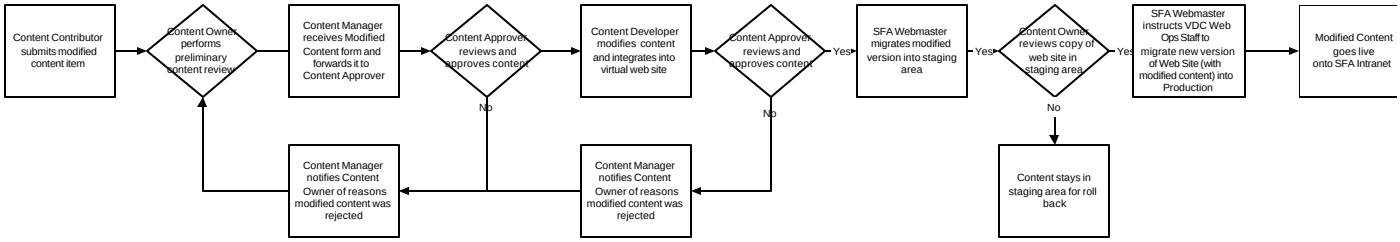
6.3 Modify Content Process

The Modify Content Process updates content items that already exist on the Intranet Application. Since these content items have already gone through the Create Content Process review cycle, a shorter review process will be used. However, if the Content Manager determines that substantive changes have been made to the content item he or she can resubmit the content item to the full Create Content Process review cycle.

An example of a situation that would use the Modify Content Process would be if a Content Contributor in the "News Update" group decided they wanted to change the wording for an advertisement that is already displayed on the Intranet. Rather than subjecting the change to the full review process, they would submit the change request to the Modify Content Process.

The diagram below illustrates the Modify Content Process.

Figure 8: Modify Content Process Diagram



The table below describes the Modify Content Process in detail.

Figure 9: Modify Content Process Description

Step	Description
1	**Content Contributor submits modified content item to Content Owner** The Content Contributor identifies information that already exists on the Intranet that requires modifications or corrections. The Content Contributor may also apply for refreshed content of similar format and fixed wording. (e.g., archived news articles)
2	**Content Owner performs preliminary content review** The Content Owner receives the item and reviews the content to ensure that the modifications made to the item are the right information going to the right audience at the right time. Prioritizes as appropriate and assigns to a release Content Owner.
3	**Content Manager receives modified content form and forwards it to Content Approver** The Content Manager checks TeamSite inbox or receives email notification that he/she has been assigned a content item to review. The Content Manager reviews the content item through Interwoven TeamSite. The Content Manager maintains the integrity of the content item throughout the life cycle of submission process.
4	**Content Approver reviews and approves modified content** The Content Approver checks TeamSite inbox or receives email notification that he/she has been assigned a content item to review. The Content Approver reviews the content item for grammar and spelling. If the Content Approver authorizes the content item, the content item is submitted to the Content Developer. If the Content Approver does not authorize the content item, the Content Approver notifies the Content Manager of the reasons the content item was rejected.
5	**Content Developer modifies content and integrates into virtual Web Site** The content Developer checks TeamSite inbox or receives email notification that he has been assigned a content item to develop. Content Developer uses his/her web authoring tool of choice (e.g. Dreamweaver, Net Objects Fusion, FrontPage) to format documents to ensure consistent look and feel of the Intranet. *See description #5 from Figure 7: Add New Content Process Description.*

6	**Content Approver reviews and approves content** The Content Approver checks TeamSite inbox or receives email notification that he has been assigned a content item to review. The Content Approver conducts a review of the modified content item to verify that content conforms to SFA Styleguide, usability and accessibility guidelines. This review may include obtaining legal authorization such as ensuring there is not a breech of copyright or confidentiality involved with the publishing of specific information. If the Content Approver authorizes the content, the content is submitted to SFA Webmaster for deployment in staging area.
7	**SFA Webmaster migrates modified version into staging area** The SFA Webmaster Team checks TeamSite inbox or receives email notification that they have been assigned a modified content item. The SFA Content Webmaster Team conducts a review of the content item through Interwoven. If the team authorizes the modified content, the content is migrated into staging area.
8	**Content Owner reviews copy of Web Site in staging area** The Webmaster team submits the modified content to the Content Owner for final review on the web site. If the Content Owner does not authorize the modified content item, the content stays in staging area for roll back.
9	**SFA Webmaster instructs VDC (Virtual Data Center) Web Operations Staff to migrate new version of Web site (including modified content) into Production** The Webmaster is responsible for ensuring that the authorized and modified content goes live onto the SFA Intranet by working with the Web Operations Staff. In addition the Webmaster is tasked with providing consistent functionality and Web operating capability to the SFA organization.

6.4 Expedited Add Content Process

The Expedited Add Content Process is used to add content items to the Intranet Application that need to be added in a short period of time. Content Managers and Channel Representatives will determine when the Expedited Add Content Process will be used for content items. Since these content need to be added to the site expeditiously, a shorter review process will be used.

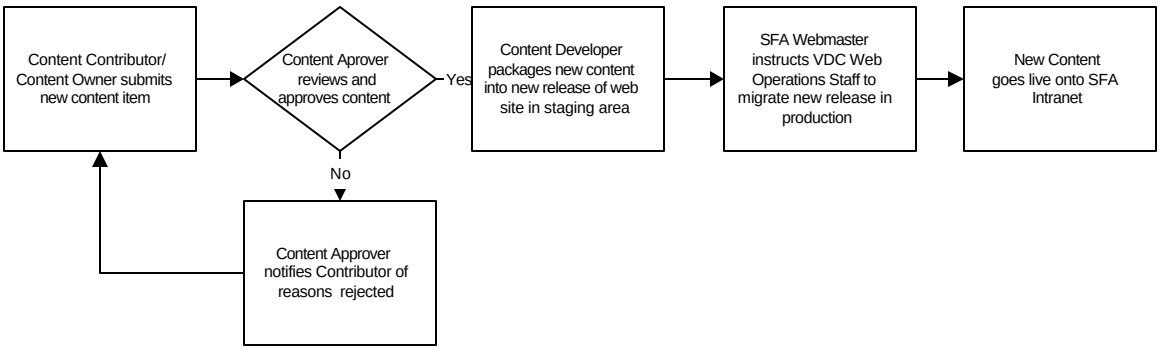
Once the content is online the Channel Representative will notify all required Content Approvers of the new content. The required Content Approvers will review the new content and notify Content Owner of authorization or required changes.

The Expedited Add Content Process should be followed for high priority cases only. High priority cases are as follow:

- Content has been authorized by content owners to be posted on Intranet in less than 2 hours
- General Managers, COO, CFO, CIO or Directors of shared services (Contracting & Acquisition, Human Resources, Analysis, Communications and SFA University) make special requests for content item be posted on Intranet
- Content is considered urgent because it affects entire SFA organization or entire channel/shared services
- Corrections of erroneous information

The diagram below illustrates the Expedited Add Content Process.

Figure 10: Expedited Add Content Process



The table below describes the Expedited Add Content Process in detail.

Figure 11: Expedited Add Content Process Description

Step	Description
1	**Content Contributor/Content Owner submits new content item** The Content Contributor identifies information or content items currently posted on the Intranet or in the submission process that requires additional content or edits in a short period of time. The Content Contributor submits content item to the Content Owner for review.
2	**Content Approver reviews and approves content** The Content Approver checks TeamSite inbox or receives email notification that he has been assigned a content item to review. The Content Approver conducts a review of the modified content item . Grammar and spell check is performed. The content should conform to SFA Styleguide, usability and accessibility guidelines to be accepted in this expedited process. This review may include obtaining legal authorization such as ensuring there is not a breech of copyright or confidentiality involved with the publishing of specific information. If the Content Approver authorizes the content, the content is submitted to the Content Developer who packages the new

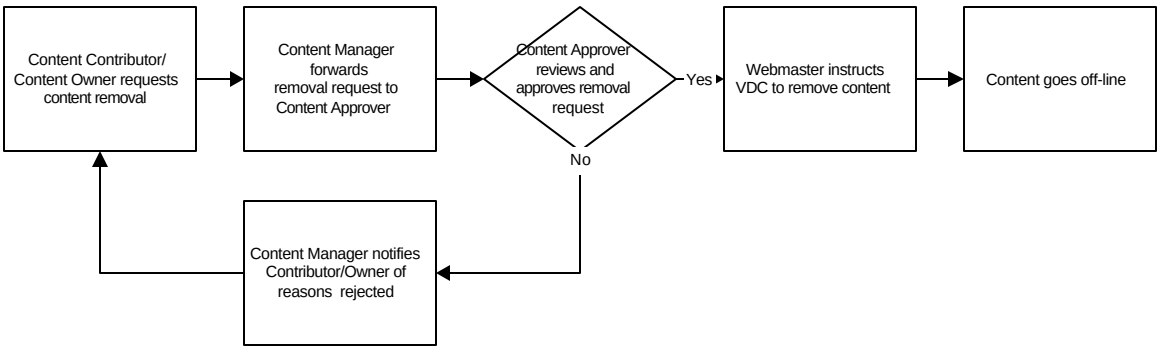
	content into a new release of the web site. If the content is rejected, the Content Approver notifies the Content Contributor/Content Owner with reasons why content is not applicable.
3	**Content Developer reviews and approves content** The content Developer checks TeamSite inbox or receives email notification that he has been assigned a content item to develop. Content Developer uses his/her web authoring tool of choice (e.g. Dreamweaver, Net Objects Fusion, FrontPage)to format documents that ensure consistent look and feel of Intranet.
4	**SFA Webmaster instructs VDC (Virtual Data Center) Web Operations Staff to migrate new version of Web site (including modified content) into Production** The Webmaster is responsible for ensuring that the approved and modified content goes live onto the SFA Intranet by working with the Web Operations Staff. In addition the Webmaster is tasked with providing consistent functionality and Web operating capability to the SFA organization.

6.5 Remove Content Process

The Remove Content Process will be used to remove content items that are out of date or inaccurate. Content Managers will be able to follow the process to remove designated content items from the Intranet application. Channel representatives will also be able to remove content items from production through the Remove Content Process.

The diagram below illustrates the Remove Content Process.

Figure 12: Remove Content Process



The table below describes the Remove Content Process in detail.

Figure 13: Remove Content Process Description

Step	Description
1	**Content Contributor/Content Owner requests content removal** The Content Contributor / Content Owner identifies content that is out of date or inaccurate. The Content Contributor makes a request for the removal of content items that are out of date or inaccurate.
2	**Content Manager forwards removal request to Content Approver** The Content Manager checks TeamSite inbox or receives email notification that he has been assigned a delete request to review. The Content Manager conducts a review of the request through Interwoven TeamSite. The Content

	Manager ensures the integrity of the content throughout the life cycle of submission process.
3	**Content Approver reviews and approves removal request** The Content Approver checks TeamSite inbox or receives email notification that he has been assigned a delete request to review. The Content Approver conducts a review of the request. Grammar and spell check is performed. The content should conform to SFA Styleguide, usability and accessibility guidelines to be accepted in this expedited process.. If the Content Approver authorizes removal request, the request is submitted to the Webmaster. If the Content Approver does not authorize the removal request, the Content Approver notifies the Content Manager and the Content Manager notifies the Content Contributor/Content Owner of the reasons the request was rejected.
4	**Webmaster instructs the VDC (Virtual Data Center to remove content)** The Webmaster works with the team at the VDC to ensure that the identified content item is removed within the specified timeframe and goes off-line.

6.6 Expedited Remove Content Process

The Expedited Remove Content Process is used to remove content items from the Intranet Application that need to be removed in a short period of time. Content Managers and Channel representatives will determine when the Expedited Remove Content Process will be used for content items. Since these content need to be removed from the site expeditiously, a shorter review process will be used.

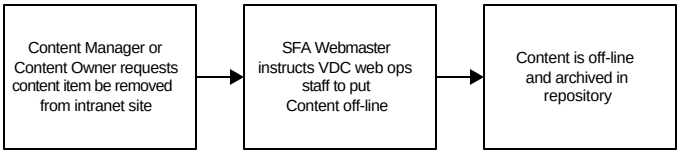
The Expedited Remove Content Process should be followed for high priority cases only. High priority cases are as follow:

- Content has been authorized by content owners to be posted on Intranet in less than 2 hours
- General Managers, COO, CFO, CIO or Directors of shared services (Contracting & Acquisition, Human Resources, Analysis, Communications and SFA University) make special requests for content item be posted on Intranet

Content is considered urgent because it affects entire SFA organization or entire channel/shared services

The diagram below illustrates the Expedited Remove Content Process.

Figure 14: Expedited Remove Content Process



The table below describes the Expedited Remove Content Process in detail.

Figure 15: Expedited Remove Content Process Description

Step	Description
1	**Content Manager or Content Owner requests content item be removed from Intranet site** The Content Manager or Content owner identifies a content item to be removed from the Intranet site within a short time period.
2	**SFA Webmaster instructs VDC (Virtual Data Center) Web Operations staff to put content off-line** The SFA Webmaster works with the VDC staff to ensure that the identified content item is removed from the site within a short period of time. The content will no longer be viewable on the site. The item will be off-line, but editable. The Content Managers or Content Owner can change the status back to on-line, if the content item is corrected.