Web Content Approval 3900

Replaces Section No.: Portions of Section 3800 (October 20, 2003)

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Approved: *Original signed by Gavin Payne* Effective Date: March 1, 2010

PURPOSE

The purpose of this policy is to ensure that all California Department of Education (CDE) Web content, which is to be posted to or is to remain posted to any Web site, has been approved at the appropriate level by CDE personnel in the most efficient manner.

Appropriate review and approval of all CDE Web content ensures that the content is consistent, authoritative, and accurate for CDE stakeholders and the public.

POLICY

New, modified, or deleted Web content posted to or removed from CDE and non-CDE Internet Web products (see Section 4.9 for the definition of "Web product") must be approved following this policy prior to posting to or removal from the Web.

CDE Web standards and the CDE processes and procedures governing CDE Web products may require periodic review of Web content. Any changes to Web content made as a result of these periodic reviews must follow this policy.

This policy also governs the Web Content Review Committee, which oversees continuous improvement of content throughout the entire CDE Web presence.

This policy does not apply to approval of Web content posted to the CDE Intranet Web site, which has separate governance under the Intranet Content Approval Standards.

RESPONSIBILITIES & SCOPE

CDE Web content approval is separated into three categories: 1) content that has already been approved by another specified approval process, 2) content that does not require approval, and 3) content that requires approval.

1 Already Approved by Another Specified Process
1.1 CDE Press Developmental and Production Editing Projects (DEAM 3800)
1.2 Other Already Approved Content
2 No Approval Required
3 Approval Required
3.1 Manager/Supervisor Approval
3.2 Division Director Approval
3.3 Branch Deputy Approval
4 Additional Approval Information
4.1 Web Products Developed Under Contract
4.2 Web Applications
4.3 Web Standards
4.4 Required Writing Styles
4.5 CDE Press Copyediting Service
4.6 WEB-001 Form
4.7 Annual Review
4.8 Web Content Oversight
4.9 Definitions

1. Already Approved By Another Specified Approval Process

1.1 CDE Press Developmental and Production Editing Projects (DEAM 3800)

Content that is part of CDE Press developmental and production editing projects (collaboration with content providers, editing, graphic design, art, layout, formatting, print coordination, overall project management, etc.) is governed by Department of Education Administrative Manual (DEAM) 3800 policy and is specifically exempt from needing any further approval under this policy.

Content requiring CDE Press involvement includes books, booklets and fact sheets; conference programs; annual reports and other formally published reports; marketing materials (brochures, fliers, ad copy, posters and so on); and text for lobby displays and signage.

This Web content approval policy may not be used as a basis for approval of content that is required by DEAM 3800 to be part of CDE Press developmental or production editing projects.

This Web content approval policy, however, does govern approval of all CDE Web content including content that is only copyedited by CDE Press. CDE Press copyediting services are detailed at each approval level in the sub-sections of Section 3 and are summarized in Section 4.5.

Though content that is approved under DEAM 3800 is waived from further approval under this policy and is therefore considered already approved, Division Web Coordinators must maintain a copy of the approved Summary Cover Memo or the appropriate EXE form for this content.

1.2 Other Already Approved Content

The following types of CDE Web content that have received extensive review and approval under other CDE approval processes, policies, or guidelines will be considered "already approved" and will require no further review or approval for posting under this policy:

Content Approved Using the Summary Cover Memo Form and Process (the following list only)

- Request for Applications (RFA)
- Request for Proposals (RFP)
- Request for Data (RFD)
- Request for Submissions (RFS)
- Request for Quotes (RFQ)
- Funding Results
- Correspondence and its attachments
- Reports to the Legislature

Deletion from the Web of content in the above list requires, at a minimum, division director-level approval (see Section 3.2).

Content Originating From and Submitted for Posting Directly by the Following Entities and CDE Offices

- State Board of Education
- Curriculum Commission
- Office of the Superintendent
- Executive Office Support
- Communications Office
- Legislative Affairs Division
- Legal Division

Content originating from and submitted directly by the entities/offices listed above may be added/modified/deleted with no additional approval at the request of the entity/office.

The Division Web Coordinator must maintain a copy of the approved Summary Cover Memo or WEB-001 form when the forms are used as the basis for approval for the content listed above.

2. Does Not Require Approval

The following minor changes to previously approved CDE Web content may be undertaken by CDE contractors and CDE Web Contributors without additional approval:

- Fix an existing hyperlink (usually broken) to reference the same content at a new URL destination on an existing Web product.
- Reformat existing CDE Web content that has been previously approved under this policy into other file format or formats (e.g., Word to PDF). This only applies if all content remains the same.
- Split or combine approved content into appropriately sized pages for the Web. This includes adding tables of contents or navigation menus.
- Fix misspellings and punctuation errors.
- Fix the following incompatible format styles so that CDE Web content conforms to the following guidelines and standards: the CDE Correspondence Guide, the CDE Style Manual, and CDE Web standards:
    - Fix the phone number format.
    - Remove all underlines except those used for active hyperlinks and replace them with other format styles such as bold.
    - Change heading styles or capitalization.
    - Modify text indention, text alignment, or margins.
    - Modify font style or size.
    - Add/modify/delete link notations. For example: (PDF, 12KB; 4pp.)
    - Add an attribution of authorship to the CDE, or when necessary, to another appropriate entity.
    - Add/modify/delete metadata information (this does not include displayed page titles or descriptions, which are considered content that must be approved).
    - Add/modify/delete alternative text in the properties of an image/graphic.
    - Add/modify/delete captions and text transcripts for multimedia that has been approved under this Web content approval policy.
    - Add/modify/delete text transcripts which are exact reproductions of the content in a multimedia item.
    - Add/modify/delete professionally translated non-English versions of English language content that has been previously approved under this policy.
- Any other technical change that does not change any content that has been previously approved under this policy.

3. Requires Approval

3.1 Manager/Supervisor Approval

The following types of CDE Web content require, at a minimum, manager/supervisor-level approval:

- Add/modify/delete the following types of information in previously approved and posted Web products:
    - List information including contact names, addresses, phone numbers, organization names, and e-mail addresses.
    - Hyperlinks and associated hyperlink descriptions.
    - Events or calendar items (not including public meeting or hearing notices and their associated attachments.)
    - Content related to CDE staff assignments.
- Regular database updates, including databases that are used with Web applications.
- Convert URL hyperlinks to descriptive link text hyperlinks and vice versa in otherwise approved Web products.
- Add/modify/delete Accessible Alternate Versions of Web content that has been approved under this Web content approval policy.
- Add/modify/delete items in the Related Links section of CDE Web pages.
- Modify dates in previously approved content that is being re-posted without any other changes to content and add/delete entire Web products where the addition and corresponding deletion are only done in order to modify dates without any other changes to content. Examples of dates that can be changed:
    - Fiscal years
    - School years
    - Due dates
- Add/modify/delete forms.
- Add/modify/delete content within Web applications including (also see Section 4.2):
    - Error and validation messages, application logic, and functionality.
    - Content that is submitted by Web application users that will become Web content.
- Add/modify/delete content that provides instructions for Web applications (also see Section 4.2).
- Add/modify/delete all CDE Web content posted to Non-CDE Web products, which are usually, but not always contracted Web sites (Contracted Web products require submission by the assigned Contract Monitor, see Section 4.1).

Content that is approved at the manager/supervisor-level must be approved using the WEB-001 form. Referrals to CDE Press for copyediting are optional and when made, are

done prior to the manager/supervisor signing the WEB-001 form. The Division Web Coordinator must maintain a copy of the approved WEB-001 form.

3.2 Division Director Approval

The following types of CDE Web content require, at a minimum, division director-level approval:

- Add/modify public meeting notices, hearing notices, agendas, and related documents.
- Add/modify "Live" Webcasts (archived versions fall under branch deputy-level approval).
- Add/modify management bulletins and information alerts.
    - This includes any type of "safety-related" issue, such as food recalls and warnings.
- Add/modify any Web content where branch deputy authority has been specifically delegated and that is not governed by another specified approval process (see Section 1).
- All other deletions of entire Web products not previously listed in this policy.

Content that is approved at the division director level must be approved using the WEB-001 form. Referrals to CDE Press for copyediting are optional and when made, are done prior to the division director signing the WEB-001 form. The Division Web Coordinator must maintain a copy of the approved WEB-001 form.

3.3 Branch Deputy Approval

Except as noted in sections 1 and 2 for Web content that does not require additional approval or requires only technical edits; and for sections 3.1 and 3.2, which allow content to be approved by managers/supervisors and division directors respectively, all other CDE Web content must be approved at the branch deputy-level.

Branch deputies may delegate any portion of this authority back to a division director. When authority is delegated, the delegation should be specific and include the types of Web content and/or content subject matter that are delegated as well as whether the authority delegated is temporary or ongoing.

The following types of CDE Web content require branch deputy-level approval:

- Add/modify all other Web content that does not have approval specified elsewhere in this policy (sections 1 through 3.2), including but not limited to:
    - Web pages
    - Web documents (e.g., Word, Excel, PowerPoint, PDF)
    - Multimedia and Web-related objects (audio, video, flash, etc.)

Approval at the branch deputy-level is also required in order to add/modify/delete any part of the core information structure (content outline) for the main CDE Web site. Changes to the topics, sub-topics, and sub-sub-topics and their related descriptions are referred to the branch deputies by the Web Content Review Committee (Section 4.8).

Content that is approved at the branch deputy-level must be approved using the WEB-001 form. Referrals to CDE Press for copyediting are optional and, when made, are done prior to the branch deputy signing the WEB-001 form. The Division Web Coordinator must maintain a copy of the approved WEB-001 form.

4. Additional Approval Information

4.1 Web Products Developed Under Contract

Contract Monitors are responsible for ensuring that all CDE Web content that is posted to contracted Web products is approved under this Web content approval policy.

Contract Monitors must initiate the WEB-001 form for approval of all CDE Web content changes (add/modify/delete) for contracted Web products for which they are the monitor. Approval of CDE Web content must occur before it is made available to end-users.

CDE Web content posted to contracted Web products is approved at the manager/supervisor-level (Section 3.1) using the WEB-001 form. Referrals to CDE Press for copyediting are optional and when made, are done prior to the manager/supervisor signing the WEB-001 form. The Division Web Coordinator must maintain a copy of the approved WEB-001 form.

4.2 Web Applications

Web applications present technical difficulties with regard to CDE Web content approval. Web applications are usually composed of static Web pages that contain text, graphics, and Web controls (e.g., buttons, text fields, checkboxes); and dynamic Web pages that contain content which will vary depending upon choices made on the static pages by a user.

Depending upon the complexity of the Web application, it may be impractical to review each dynamic Web page. Therefore the following Web application content must be submitted for review and approval:

- Additions, modifications, and deletions of content on each static page (including system or error pages that may not regularly be seen).

- Additions, modifications, and deletions to static content that appears on each dynamic page.
- A single sample of dynamic content from each type of dynamic page.
- Additions, modifications, and deletions of error messages and validation messages.
- Each submission by end-users to any Web application that will become CDE Web content (this is most easily accomplished by providing moderator functionality to the appropriate CDE manager/supervisor).

The responsibility for initiating the WEB-001 form for a Web application is based upon whether the Web application is developed by CDE staff or by a contractor:

- The CDE division contact or project lead must initiate the WEB-001 form for approval of Web applications developed by CDE staff.
- The Contract Monitor must initiate the WEB-001 form for approval of Web application content that is associated with contracted Web products.

Approval of Web application content must occur before it is made available to end-users.

CDE Web content that is part of a Web application is approved at the manager/supervisor-level (Section 3.1) using the WEB-001 form. Referrals to CDE Press for copyediting are optional and, when made, are done prior to the manager/supervisor signing the WEB-001 form. The Division Web Coordinator must maintain a copy of the approved WEB-001 form.

4.3 Web Standards

In addition to content approval, all CDE Web content must meet all CDE Web standards in order to be posted to or remain posted on CDE and non-CDE Web products.

CDE Web standards are in place to ensure that all Web products containing CDE Web content are consistent and effective communication tools; meet the expectations of stakeholders and the general public; and ensure compliance with all applicable laws, including federal and state accessibility laws.

CDE Web standards are located on the CDE Internet Web site at http://www.cde.ca.gov/re/di/ws/webstandards.asp

4.4 Required Writing Styles

Authors of CDE Web content must follow writing rules established to ensure consistency and quality of CDE content.

Correspondence items such as letters and memorandums must adhere to the writing and formatting rules in the CDE Correspondence Guide. If an issue is not addressed

adequately in the CDE Correspondence Guide, the current edition of the Gregg Reference Manual is considered as a backup.

News Releases prepared by the CDE follow the writing style as indicated in The Associated Press Style Book and Libel Manual.

All other writing that will become CDE Web content must follow the styles and usage that are indicated in the CDE Style Manual, which is maintained by CDE Press. When the CDE Style Manual does not address a topic, the Chicago Manual of Style is referenced.

Efforts have been made to ensure that conflicts are minimized between Web standards and any of the CDE developed writing guides.

4.5 CDE Press Copyediting Service

The copyediting services of CDE Press are available for all Web content that requires approval and is governed by this Web content approval policy. Managers/supervisors, division directors, and branch deputies should send any content to the CDE Press that needs the copyediting expertise provided by CDE Press.

A manager/supervisor, division director, or branch deputy sends the WEB-001 form together with the content to be reviewed and copyedited to CDE Press. Space on the WEB-001 form has been reserved for the approver to supply a PCA and index number so the work of CDE Press can be charged to the appropriate cost center. An approver sending the WEB-001 form to CDE Press withholds their signature until the WEB-001 form is returned with copyedits provided by CDE Press.

4.6 The WEB-001 Form

The WEB-001 form is used to document approval of all CDE Web content, except as noted in sections 1 and 2 where use of the WEB-001 form is considered optional.

The WEB-001 form can be found in the CDE Intranet Forms Center.

The submission of CDE Web content for review and approval may be done by either printing a draft of each Web product or by printing the proposed Web content in an alternate format, such as Microsoft Word. These printouts are then attached to the back of the WEB-001 form for review, optional editing by CDE Press, and approval.

Division Web Coordinators must retain a copy of the signed WEB-001 form, approved at the appropriate levels, for all CDE Web content requiring approval, or they must retain a copy of the Summary Cover Memo or the appropriate EXE form if the item is CDE Web content considered already approved.

Division Web Coordinators must keep these forms on file for at least one year.

4.7 Annual Review

All CDE Web content must be reviewed annually to ensure that it continues to be appropriate for posting, is accurate, and that it meets all CDE Web standards.

4.8 Web Content Oversight

The Web Content Review Committee (WCRC) is a working group that provides comprehensive Web content oversight for the entire CDE Web presence.

The WCRC is co-chaired by the director of the Communications Division and the managers of the Executive Office Support Unit and the Web Services Office, who are directed to ensure that the entire CDE Web presence fulfills the communication needs of the CDE.

The WCRC will include appropriate staff from the Executive and Web Services Offices, and a designee from each branch as determined by each branch deputy.

The committee will not be part of the review and approval process for most CDE Web content, nor will it be involved in technical design. The committee will:

- Review and forward all requests for changes to the core information structure (content outline) of the main CDE Web site, including the topics, sub-topics, or sub-sub-topics for approval by the appropriate branch deputy.
- Review CDE Web content anywhere in the CDE Web presence on both CDE Web products and non-CDE Web products for:
    - Quality
    - Consistency
    - Ease of use
    - Recommendation for CDE Press copyediting
    - Relevance to stakeholders
    - Proper location
    - Information gaps in the CDE Web presence.
- Form sub-committees for new CDE Web content development that can include additional content experts from both inside and outside the CDE.

4.9 Definitions

Web product – the term “Web product” includes Web pages, Web documents, Web applications, Web sites, or any other Web-related items.

Web pages – are files, usually in HTML or XHTML format, that are accessed most commonly by Web browsers.

Web documents – are stand-alone files that are accessed primarily via another software application, but that are now increasingly available via most Web browsers. The most common Web documents are Microsoft Word, Excel, PowerPoint, and Adobe PDF files.

Web applications – are a collection of Web pages that have been augmented with programming that enables users to interact with them. They usually incorporate a database in the background. Examples of Web applications include search pages, dynamic reports, surveys, and any Web page that allows users to input and submit information.

Web sites – are collections of any combination and number of Web pages, Web documents, and Web applications that are available from the same domain (think of a domain as the "core" of a URL). The domain for the CDE is "cde.ca.gov".

Other Web-related items – is a catch-all term that reflects the fast-changing world of the Web. Things like multimedia audio and video or interactive maps may not fall cleanly into any of the other categories, but are also included in the definition of Web products. Anything posted to the Web that is not a Web page, Web document, Web application, or an entire Web site, is considered an "other Web-related item".

CDE Web products – are any Web products that are posted to or housed on CDE Web servers or that are created to look like they are part of the main CDE Web site. For example, those that use of the official CDE seal.

Web content - the term "Web content" includes any information that is available to any users via Web products. Web content includes text, images, graphics, data, audio, video, and Web application functions and logic.

CDE Web content – is any Web content that is:

- Created, modified, or maintained by CDE staff.
- Created, modified, or maintained by a CDE contractor or is the result of any CDE contract.
- Created, modified, or maintained on behalf of the CDE.
- Posted to or as part of any CDE Web product regardless of authorship.
- Attributed to CDE authorship or authority.