# State Auditor's Office (SAO)

## Website Migration Project:
## Website Change Process Document

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# Overview

## 1.1  PURPOSE

The Washington State Auditor's Office acknowledges the importance of its external facing website sao.wa.gov and the need to continually maintain and improve it. This document records how the agency will manage site maintenance and improvement. Its purpose is to ensure the support of the SAO employees tasked with this work, including those who have identified the opportunity for improvement and those helping to facilitate the process and change. The end goal is a process that promotes improvement and maintenance through a collaborative approach between all of SAO.

## 1.2  PROCESS GOAL

Currently, the Comms Team staffers make changes to the website when they identify a need for a correction, addition, or removal of content, or when another SAO employee requests a change. The latter are unpredictable, often informal in nature – a call, a message or an email – and difficult to evaluate and prioritize. Standardizing the process of requesting website changes for SAO employees will reduce rework and uncertainty around responsibility, while ensuring greater consistency in content quality. Recording requests for content revisions will help SAO verify success against the submitted change request and expectation and prioritize ways to improve implementation of change and the request process.

## 1.3  PROCESS DELIVERABLES

- Visual Document outlining the process
- Written summary.
- Process must be evaluated by the workgroup
- Process must have key process indicators
  - Target Publish Date
  - Initial Review
  - Website approval
  - Testing
  - Publish
- Automated Communication
  - Creating request
  - Change in request status
- Central location for tracking and checking status
- Shared Document location and Archiving
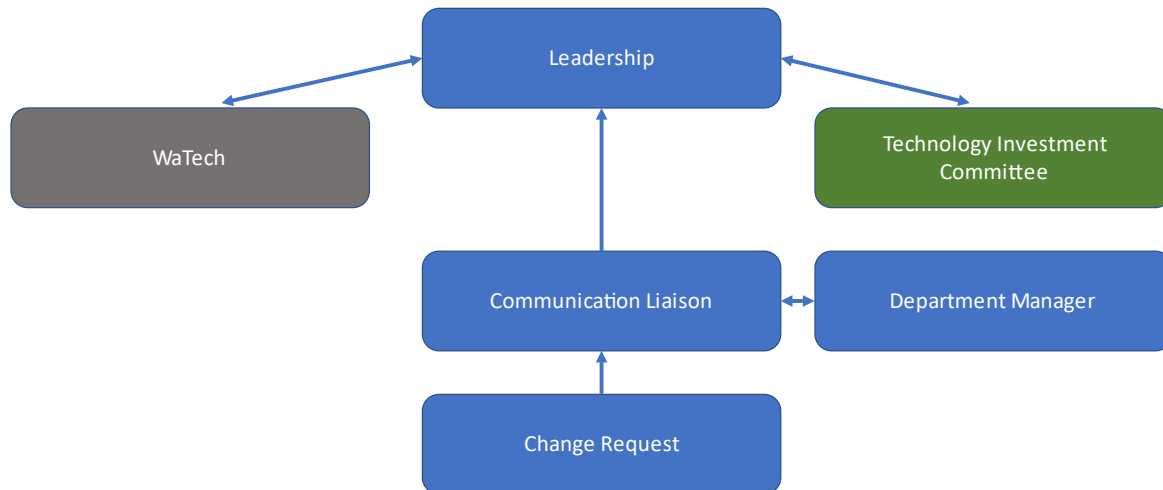
# 2  Scope

## 2.1 IN SCOPE

Process Scope includes all change requests for the external sao.wa.gov site with two major exceptions: changes to the BARS manual and The Center for Government Innovation's resources. Examples of categories and types of change requests include:

- Category 1 – Minor Changes
  - Correcting a typo
  - Links change
  - Revising page text (submitted by program manager)
  - Removing or adding reports
- Category 2 Moderate Changes
  - Content change
  - Adding Image
  - Low internal Complexity (Within SAO)
- Category 3 – Major Changes
  - Examples of major changes include: Change affects website functionality (such as changing search features); change alters website structure (such as adding a new section to topline navigation); change is a new feature requiring development consultation or assistance (such as researching Drupal plug-ins to facilitate existing website features). To complete the change requires input from one or more parties outside Comms Team:
  - Moderate to High Internal Complexity (Within SAO)
  - Keyword and category changes to the Audit Connection blog
  - Revising page text (submitted by staff)
  - Creating of a new page
  - Complete redesign of a page
  - SME
  - The work requires IT assistance
  - The work requires WaTech assistance

## 2.2  OUT OF SCOPE

- BARS Manual
- Center Resources
- Budget Decisions

## 2.3    WEBSITE CHANGE HIERARCHY



## 2.4    ROLES MATRIX

## 2.5    MEETING MATRIX

| ROLE | Initial Review meeting | Draft Review Meeting | Testing Meeting | Final Review | Website committee Session | WaTech |
|------|------|------|------|------|------|------|
| **Author** | X | X | X | X | | |
| **Communication Liaison** | X | X | X | X | | |
| **SME** | | X | X | | | |
| **Manager** | | | | X | | |
| **LEADERSHIP** | | | | | *X | *X |

# 3   Roles & Responsibilities
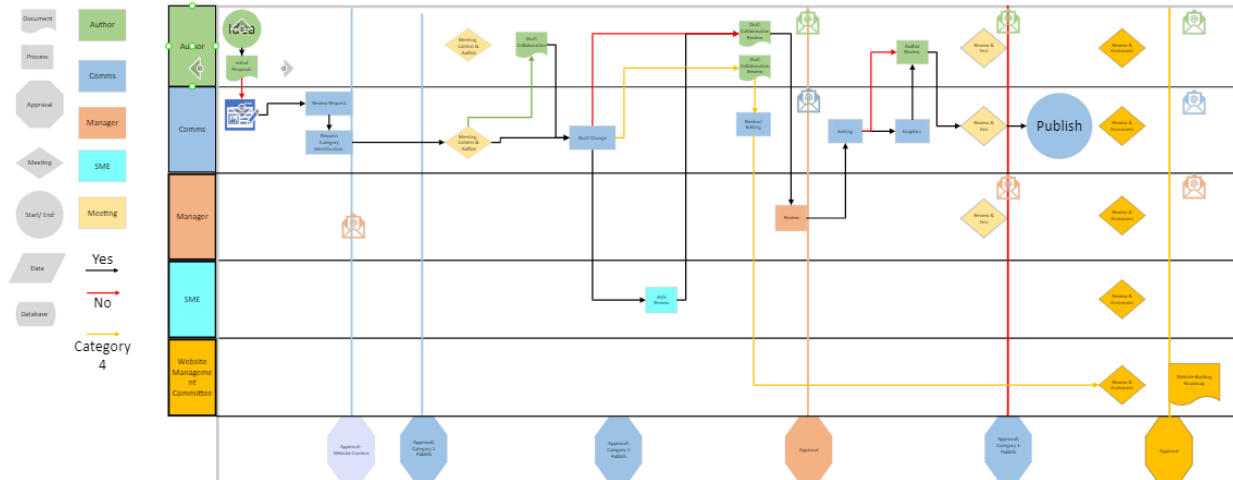*Optional Based on Category
^Website Request App

| TITLE | DESCRIPTION | RESPONSIBILITY |
|-------|-------------|----------------|

| Author | The person who submits the change request | • ^Submits an external change request via the app<br>• Provides the communication liaison with any additional requested material<br>• *Draft edits/or summary<br>• *Testing<br>• *Review & Approve Draft<br>• *Meeting with Communication Liaison |
|---|---|---|
| Communication Liaison | Communications team members associated with author's department | • ^Review change request and assign category<br>• ^*Approve request<br>• ^*Meet with Author<br>• ^*Draft website change<br>• ^*Test changes<br>• ^*Review and approve changes<br>• ^*Meet with SME or content owner<br>• Publish website changes |
| SME | Appointed by author's manager | • *Review draft changes<br>• *Approve draft changes |
| Manager | Author's Team Manager | • *Review draft changes<br>• *Approve draft changes<br>• *Test<br>• *Meet with Communications Liaison<br>• *Meet with Website Committee |
| Leadership | Director of Administrative Services<br>Director of Communications<br>Chief Information Officer | • Will approve and sign off on category 3 change requests<br>• Meet with website committee.<br>• *Appoint internal resources to manage change request<br>• *Consult with WaTech |

# 4  Communication Liaison Breakdown

| COMMUNICATION LIAISON | DEPARTMENTS/TEAMS |
|---|---|
| Adam Wilson | Legislative/Pat |
| Laura Cameron | PA/IT Audit |
| Rebecca Irwin | Center |
| Miles Sari | LGS/Local Audit |
| Mike Carter | Administrative Services/ State Audit/Special Investigations |

# 5  Process



## 5.1  PROCESS SUMMARY

The website change request process is based on categories which govern the required tasks, responsibilities, deliverables, communication, and level of testing to complete the change. The process should be flexible enough to provide quick turnaround for simple requests but also handle major changes that require multiple approvals, reviews, and testing. Communications liaisons are responsible for the entire process, including: the initial review, concept approval, category selection, drafting, final review, testing, and publishing. The process is formalized through entries in the Website Change Request app, where authors submit changes, and the Communications liaison provides updates as needed. The app will automate communication around portions of the process and can track the location of any documents associated with the change request.

## 5.2  CATEGORY 1 – MINOR CHANGE

Lead:  Communication Liaison

Additional Roles:  Author

Category Criteria –
- Typical minor requests include a link change, typos, minor text changes, removing or adding a report, or another change deemed by the liaison.

Assumptions
- The change request has been approved for the website by the communication liaison.
- Communication liaison determines that change is a category 1 change request.

Meetings
- *Review meeting (only if liaison needs clarification from the author)

Process (includes processes before category assessment and assignment)
1. The author uses the app to submit a website change request.
2. The app automatically sends the author an email confirming that the request was successfully transmitted.

3. The app automatically sends an email notification to three accounts – the Communication Liaison, Director of Communications and Communications Webmaster —that a request has been added.
4. In the app, the liaison sets the change request category to "1" based on criteria.
5. If the change is warranted, the liaison toggles the Change Request / Communications approval to "true."
    o The app automatically sends the author an email confirming the change is approved.
6. For most straightforward requests, the liaison will then make the change to content and republish the page. However, if necessary, the liaison will follow these additional steps:
    o Draft or revise proposed changed content, meeting with the author for clarification or review if needed.
    o The author and liaison meet to review and approve changes.
7. Once content is agreed, the liaison will publish changes.
8. Using the app, the liaison will update the publishing status.
9. The app automatically sends the author an email confirming the change has been completed.
10. *If the liaison declines the change, she or he will contact the author to discuss why the request wasn't approved and potential alternatives.

## 5.3    CATEGORY 2 – MODERATE CHANGE

Lead: Communication Liaison

Additional Roles: Author, Supervisor

Category Criteria –

- Change request type requires website planning and or strategy when applying the change but have low internal complexity. Ex: Manager submits a website request for their department.
- Category 2 change request types include but are not limited to:
    o Significant content change
    o The change consists of an image.

Assumptions

- The change request has been approved for the website by the communication liaison.
- Communication Liaison determines that change is a category 2 change request.

Meetings

- Review Meeting
- Approval Meeting

* Optional process steps based on Communication Liaison and Authors discretion

Process (includes processes before category assessment and assignment)

1. The Author submits the change request via the Website change request power app.
2. The Author receives confirmation email.
3. Communication Liaison. Director of Communications, and Communications Webmaster account receive an email notification from the app to review requests.
4. Communication Liaison performs the initial review.
5. Communication Liaison will toggle the Website Change Request – Communication Approval: true.
6. The Author is notified of the approval of the change request via the app.
7. Communication Liaison sets change request categories based on criteria. (Following process steps are based on category 2)
8. The Communication Liaison will draft proposed changes to the site.
9. Communication Liaison and Author will meet to discuss the change and decisions made around the request. (Review Meeting)
    Changes are required after initial review meeting

1. \*The Communication Liaison will draft proposed site changes.
2. \*The Author and Communications Liaison will have a final review and approval for changes. (Approval Meeting)
   1. \*Supervisor may choose to participate in the final review
10. The Communication Liaison will publish changes.
11. Communication Liaison will update the publishing status via the app.
12. The Author will receive an email confirmation via the app.
13. The Supervisor will receive an email confirmation via the app.
14. \*If the change is not approved, the Communication Liaison will contact the Author about why the change request wasn't approved and potential ways to move forward.

## 5.4   CATEGORY 3 – MAJOR CHANGE

Lead:  Communications liaison

Additional Roles:  Author, Supervisor, plus Content Owner if the page/content is not within the Supervisor's ownership.

Category Criteria –

- Typical moderate changes that involve **existing** pages include:
  - Redevelopment of existing content (such as overhauling page text, reorganizing page layout, changing existing page artwork)
  - Developing new, related, content (including artwork)
  - Similar moderate changes to existing content aside from web pages might include changing keywords/categories for tagged materials (such as the Audit Connection blog)
- Changes that involve developing a **new** page may require website planning or strategy discussions and greater involvement with a subject matter expert outside the author's team. Changes with moderate or high internal complexity. Ex: Employees suggest a website change outside of their scope. They require both managers to be involved as well as potential subject matter experts.

Assumptions

- The change request has been approved for the website by the Communications liaison.
- The liaison determines that the change is a category 3 request.

Meetings (if necessary)

- Drafting Meeting
- Review Meeting
- Approval Meeting

Process

1. The author uses the app to submit a website change request.
2. The app automatically sends the author an email confirming that the request was successfully transmitted.
3. The app automatically sends an email notification to three accounts – Communications liaison, Director of Communications and Communications Webmaster —that a request has been added.
4. In the app, the Communications liaison toggles the Change Request / Initial review status to "true." The liaison then reviews the request.

5. In the app, the liaison sets the change request category to "3" based on criteria.
   - This action triggers the app to send an automated email to the author's supervisor, informing them of the request.
6. The communication liaison will assign the author a site role on sao.wa.gov.
   - Site Visitor – The author will not be given any additional permissions and will only be able to review changes with communications liaison.
   - Content Viewer – The author will have access to view draft content changes without the communication liaison but will not have the ability to edit or publish any content.
   - Content Contributor – The author will have the ability to create a draft page, edit content, and submit for approval but will not be able to publish content.
7. Depending on the nature of the content and the relationship of the author to the content, the liaison will take one of these paths:

   A) **The proposed change is within the author's own content area**.
   - If the author has provided proposed draft content, the liaison and author meet to discuss the change and refine it further as needed.
   - If the author has provided an idea but not content, the liaison and author meet to develop the content.
   - In either case, the liaison may decide to involve the author's supervisor to ensure the proposed changes or new content meet the content owner's needs and expectations.

   B) **The proposed change is *not* within the author's own content area.**
   - Whether or not the author has provided proposed draft content, the liaison identifies the page's content owner and informs them outside of the app that a colleague has proposed a change to their area of the website.
   - The liaison and author meet to discuss the change and develop or refine it as needed.
   - Once the content is in a reasonable state for review, the liaison involves the author's supervisor and the content owner to ensure the proposed changes or new content meet the content owner's needs and expectations.

8. In either circumstance, the liaison and author meet for a final review of the content.
   - *Supervisor and content owner may choose to participate in the final review
9. Once the content has been reviewed and the communication liaison has received confirmation of approval from author and supervisor the communication liaison will change the status of Draft Complete to "true".
10. The liaison will publish changes.
11. Using the app, the liaison will toggle the Change Request / Publishing status to "true."
12. The app automatically sends the author and the supervisor an email confirming the change has been completed.
    - If necessary, the liaison will also confirm publication with the content owner.
13. The app will automatically move the change request to the website change archive list.
14. *If the liaison declines the change, she or he will contact the author outside of the app to discuss why the request wasn't approved and potential alternatives.