



AGENCY MANAGED DIY WEBSITE REDESIGN GUIDELINES

V4.0

Contact:





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Agency Managed DIY Website Creation Guidelines

This document outlines the process to re-design your website from start to finish. This guide is separated into 4 sections: Getting ready, submit documentation, build your site and launch. Each section contains important information to help you redesign your site, along with important actions that must be taken to progress to the next stage.

The icons below highlight the outcome of each specific step. Certain tasks require you to upload documentation for review by the E-Government Program, while other tasks are for internal review within your agency.








Upload these tasks for review	
Complete these tasks on your own	
Resources	
Contact the E-Government Service Desk	

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Stage One: Getting ready

Stage one outlines the initial steps to prepare your documentation for review. At the end of this stage you will have completed the following required tasks and submitted the related documents to the E-Government Program for review:

- Card Sort
- Plan
- Content Audit
- Key User Tasks

Once you have submitted these documents and the agency-managed website redesign request form, the E-Government Service Desk will create a staging area for you to begin building your site.



Request a presentation

Contact the E-Government Service Desk to request an introductory meeting regarding the website redesign process by emailing egov.egovhelp@das.oregon.gov. The E-Government Service Desk will go over the redesign process and help you understand the process for your agency.



Research

Look for other agencies/boards/commissions or private firms whose work is similar to yours. Make sure they have already adopted a task-oriented, user-centric design. Notice the way they've presented their content and find inspiration for your organizing your site.

As you think about your site redesign and research other sites, consider the following:

- What are the top tasks? Think about frequent customer; what are they looking for?
- What are the core services your agency provides?
- What content is most relevant to 80% of your customers and how should it be organized?
- What is your goal for reducing the number of pages?

This is also the time to start thinking about governance—how will you manage the content life-cycle in the future?

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Make sure to incorporate these items into your plan in the following step.



Develop an overall plan and goals

The first document you will create is the *project plan*. The purpose of this plan is to describe the scope and objectives of your website redesign.

For examples of other Agencies' plans visit the Agency DIY Website Documentation on Zendesk: <https://egovservicedesk.zendesk.com/hc/en-us/articles/4404741139988-Agency-Managed-Website-Redesign-Documentation-Guide>



Get executive buy-in and sponsorship

With support from your organization's leadership the project will be more likely to succeed. Develop a strong message about the benefits to customers in your approach. Get your executives excited about the project by showing them examples of how others have improved their websites through content strategy and redesign. Use the sites that you researched in step one for inspiration.

There is no documentation to submit for this step.



Content audit and analytics

In this step you will create a content audit using the content inventory provided to you by the E-Government Service Desk. The content audit is a document that reviews all your existing content and marks it for deletion, updating or migrating. In addition, the content audit will also help you understand where most of your visitors go on your website, so that you can keep important pages and potentially remove pages that are going unused.

Begin by requesting a content inventory from the [E-Government Service Desk](#). You will receive a spreadsheet with a list of all the content on your website, along with analytics such as views per page and date created.

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In the spreadsheet, indicate pages to keep, edit or delete by creating a new column or by highlighting the rows with different colors. Based on the URL and file path, analytics and date, you will be able to screen out much of your site’s old and unused content without having to visit each link. Simply mark those rows for deletion.

Your content inventory can take on many forms, but the most important part is that you identify each piece of content and assign an action to each one, such as “delete”, “edit” or “capture content”. Below is a sample of a content inventory for the Board of Massage Therapists:

Action (Delete, Edit, Capture Content)	FileName	URL	CreatedBy	ModifiedBy	CreateDate	LastModified	FileSizeMB	VersionCount
Delete	requestforinfo	https://www.oregon.gov/boards/massage/Forms/RequestForInformation.aspx	OR\erant.a.movie	OR\erant.a.movie	6/18/2012 22:41	6/18/2012 22:59	0.00	2
Delete	submitcompliance	https://www.oregon.gov/boards/massage/Forms/SubmitCompliance.aspx	OR\erant.a.movie	OR\erant.a.movie	6/18/2012 22:41	6/18/2012 23:26	0.00	2
Delete	compliance.html	https://www.oregon.gov/boards/massage/Forms/Compliance.html	OR\grant.a.movie	OR\grant.a.movie	6/18/2012 23:19	6/18/2012 23:19	0.01	1
Delete	June 11 2012	https://www.oregon.gov/boards/massage/Forms/June112012DraftOrder.aspx	OR\christine.west	OR\christine.west	6/20/2012 15:15	6/20/2012 15:29	0.26	3
Delete	Mav 14 2012	https://www.oregon.gov/boards/massage/Forms/May142012DraftOrder.aspx	OR\christine.west	OR\christine.west	6/20/2012 16:17	6/20/2012 16:18	0.21	1
Delete	07.01.2012.pdf	https://www.oregon.gov/boards/massage/Forms/07012012DraftOrder.aspx	OR\christine.west	OR\christine.west	6/28/2012 16:09	7/11/2012 22:08	0.24	2
Delete	7.1.12WebText	https://www.oregon.gov/boards/massage/Forms/7112WebText.aspx	OR\christine.west	OR\christine.west	6/28/2012 16:24	6/28/2012 16:24	0.03	1
Delete	334-010-0009	https://www.oregon.gov/boards/massage/Forms/3340100009.aspx	OR\christine.west	OR\christine.west	6/28/2012 16:39	6/28/2012 16:39	0.01	1
Delete	July 1 2012	https://www.oregon.gov/boards/massage/Forms/July12012DraftOrder.aspx	OR\christine.west	OR\christine.west	7/6/2012 16:47	7/6/2012 16:49	0.02	1
Delete	96800 001Mand	https://www.oregon.gov/boards/massage/Forms/96800001MandateOrder.aspx	OR\christine.west	OR\christine.west	7/10/2012 18:41	10/17/2012 17:46	0.09	4
Delete	96800 002N	https://www.oregon.gov/boards/massage/Forms/96800002NondraftOrder.aspx	OR\christine.west	OR\christine.west	7/10/2012 18:43	10/17/2012 17:46	0.16	4
Delete	August 6 20	https://www.oregon.gov/boards/massage/Forms/August62012DraftOrder.aspx	OR\christine.west	OR\christine.west	7/12/2012 16:38	7/12/2012 16:38	0.17	1
Delete	Workers Cod	https://www.oregon.gov/boards/massage/Forms/WorkersCode.aspx	OR\christine.west	OR\christine.west	10/17/2012 16:49	10/17/2012 16:50	0.13	1
Delete	Massage Billin	https://www.oregon.gov/boards/massage/Forms/MassageBillings.aspx	OR\christine.west	OR\christine.west	1/10/2013 18:25	1/10/2013 18:25	0.24	1
Delete	01.01.2013.od	https://www.oregon.gov/boards/massage/Forms/01012013DraftOrder.aspx	OR\christine.west	OR\christine.west	1/17/2013 21:48	1/17/2013 21:48	0.04	1
Delete	SB 110 One P	https://www.oregon.gov/boards/massage/Forms/SB110OnePageIntro.aspx	OR\christine.west	OR\christine.west	1/17/2013 21:48	1/17/2013 21:48	0.05	1
Delete	sb0110.intro	https://www.oregon.gov/boards/massage/Forms/SB0110Intro.aspx	OR\christine.west	OR\christine.west	1/17/2013 21:51	1/17/2013 21:51	0.04	1
Delete	sb0111.intro	https://www.oregon.gov/boards/massage/Forms/SB0111Intro.aspx	OR\christine.west	OR\christine.west	1/17/2013 21:52	1/17/2013 21:52	0.11	1



Even if you decide to create an all-new site rather than migrate and re-write content on your current site, an audit will help you decide which content should be on your new site and which content may be added later.

The following guides will help you perform a content audit:

Understand Your Quantitative Content Inventory:

https://www.oregon.gov/das/OSCI/Documents/Understand-Your-Quantitative-Content-Inventory_Website-Redesign-Toolkit.docx

For examples of other agencies’ content audits visit the Agency DIY Website Documentation on Zendesk: <https://egovservicedesk.zendesk.com/hc/en-us/articles/4404741139988-Agency-Managed-Website-Redesign-Documentation-Guide>

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Identify top user tasks

Identifying the top tasks for visitors to your website is important for building a responsive site that meets your customers' needs. Remember, most visitors to your website are there on a mission to complete a task, whether it be renew a license, pay a fee, or learn about your agency.

Using the content audit from the previous step as a basis for your most visited and relevant pages, talk to your program staff and your customers. Find out what they most often look for when they come to your website. Remember that your admin staff is used to interacting with members of the public so be sure to consult with them!

Think about the ways a visitor would search for a specific task on your website. Capture these in a spreadsheet. This document will be submitted via service desk ticket for review, and will form the basis of your Card Sort usability test in the next step.

For examples of other agencies' user tasks visit the Agency DIY Website Documentation on Zendesk: <https://egovservicedesk.zendesk.com/hc/en-us/articles/4404741139988-Agency-Managed-Website-Redesign-Documentation-Guide>



User card sort usability tests

Card sorting involves having the public and/or external stakeholder tell which categories they would logically group various tasks. Card sorting involves creating physical or virtual cards of your top tasks and having members of the public sort the cards into categories. This grouping will help you determine how to organize the top tasks on your site.

The E-Government Program recommends that your agency use an online card sorting software tool such as "Optimal Sort".

The card sorting process should not include Government Employees.

Your card sorting results will be uploaded via a service desk ticket once it has been completed. For examples of other agencies' card sorting submissions visit the Agency DIY Website Documentation on Zendesk:

<https://egovservicedesk.zendesk.com/hc/en-us/articles/4404741139988-Agency-Managed-Website-Redesign-Documentation-Guide>

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Usability.gov has an excellent explanation of card sorting as well as a number of useful templates

Card sort overview:

<https://www.usability.gov/how-to-and-tools/methods/card-sorting.html>

Usability test plan template:

<https://www.usability.gov/how-to-and-tools/resources/templates/usability-test-plan-template.html>

Card sort template:

<https://www.usability.gov/how-to-and-tools/resources/templates/card-sort-report-template.html>

Stage Two: Submit required documentation for review



Fill out the Agency Managed Website Request Form

Fill out the form located here: <http://www.oregon.gov/das/OSCIO/Pages/egovDIYWebsite.aspx>

You must have someone sign off on your project with has authority for such decisions. In the form, you will attach the deliverables from Stage 1 (Note that not all of the above steps produce deliverables that need to be submitted). You will submit the form electronically, which will also create a ticket in the E-Government Service Desk. As long as you've done everything on the form's checklist, your site will be approved for staging. If there are any issues, a member of the E-Government service desk team will contact you on behalf of the board to work things out.

Items you will need:

- Your contact information
- Contact information for the person with sign-off authority over the project
- Your plan
- Your content audit spreadsheet

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- Your top user tasks
- Your card sort exercise results

Stage 3: Begin building out your site



Wireframe

A wireframe is a non-design document that shows the website in its barest form.

You take ideas from the card sort and all the other research you've done and begin to map out the navigational structure. This will help you organize your content and inform your build-out process. We have created a Site Structure Worksheet¹ to help you with this process.

While you will not be submitting this document, we strongly encourage you to create a wireframe to guide you in the following steps.



Begin the process of redesign

You will be given a blank staging area to begin building your site.

The E-Governance board has prepared training for routine tasks to help you build common features for your new site.



There are plenty of resources to help you in Zendesk: <https://egovservicedesk.zendesk.com/hc/en-us/articles/360052995671-Oregon-gov-Authoring-Documentation>

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Write new content

Finally! You are ready to actually write your new content and refresh old content. For content editors in your agency who are new to SharePoint, NIC USA will provide new user training. Content editors will begin writing new content into your new website's staging environment once it is made available by NIC USA.



Carry Out Usability Tests

Develop your staging website to the point that allows you to test your top tasks with real customers.

Using your top tasks, ask members of the public, either in person or using software such as “Optimal Workshop” Chalkmark or Treejack, to complete these tasks. If you decide to conduct in-person usability testing, usability.gov has an excellent explanation² and templates³ to help get you started.



If you have fewer than 20 participants, strive to attain a 78% pass rate for your tasks. If your test group includes more than 20 people, a pass rate of 70% will be sufficient¹. If you have difficulty achieving this result, consider pathways to complete the task from the areas where people incorrectly clicked, or making the links on your site more descriptive and re-test your site.

² <https://www.usability.gov/how-to-and-tools/methods/usability-testing.html>

³ <https://www.usability.gov/how-to-and-tools/resources/templates/usability-test-plan-template.html>

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Stage 4: Request Approval



Submit your site for approval

Once you are ready to launch your site, communicate with the E-Government Program Service Desk via your support ticket and request to launch your site. The Service Desk will let you know the next steps to schedule your site launch.



Broken Links Report

The E-Government Program Service Desk will send you a list of broken links from your site that are broken. Make sure that you fix these before launching your site so that your visitors don't encounter errors once your new site launches.



Redirect Worksheet

The E-Government Program Service Desk will send you a blank spreadsheet for you to redirect existing URLs to URLs in your new website. For instance, if you have a page that has your agency's laws and rules, it's likely that a visitor has bookmarked this page. Make sure to indicate in your redirect spreadsheet the old URL and where the redirect should point. Fill out this spreadsheet and return it to the E-Government Service Desk. This step is important for your high traffic pages that may have been bookmarked by your visitors and now have a different URL.

Stage 5: Go-live



Coordinate launch

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This is the most exciting part. Contact the E-Government Service Provider, NICUSA, to schedule your go-live date. Keep in mind that your launch date is also dependent on their resources. Please reach out a minimum of 3 weeks before your desired go-live date.

Stage 6: Maintain



Employ governance through workflow

Your agency single point of contact (SPOC) will help manage the website on an ongoing basis. Use the content strategy to keep content fresh. You may find, with further customer feedback, elements of the website need to change. If there are components you would like to see developed, contact the E-Governance Board and we'll take your suggestions under consideration!