NSW Department of Education

Checklist for updating your web presence

Helpful resources to improve you web presence within our education.nsw.gov.au website.

How to use this checklist

This checklist is for redesigning a web presence that may not be performing as well as it could.

This checklist **is not** for adding a single page to AEM.

To add a single page of information to AEM you will always use only a Standard page template.

Draft, edit, and approve the copy in a shared Google doc or SharePoint doc. Add the approved and finalised copy to AEM as the last step.

Your team should be able to determine the most logical spot for the page in the information architecture.

What is this?

This is a step-by-step guide to help you update your web presence.

Who is it for?

This guide is for any department staff looking to update their web presence on education.nsw or a standalone website.

How to use it

Keep referring back to this guide as your project progresses to help keep you on track. We recommend completing each step in order.

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How to prepare your team before beginning work on updating your web content.

Prepare to get started

1. Inform the Digital Design and Delivery (DDD) team

You will have expert support from the department's digital services team. You should contact them and involve them in your project at the very beginning. They are your go-to for best practice advice.

DDD will ensure you have additional support from department staff and put you in touch with your content strategist or project manager.

You will have help with running the workshops and training required to complete your web transformation project in line with best practice and department standards.

Contact edu.nsw@detcorpcomms.zendesk.com

2. Define roles and responsibilities

Creating and managing content is a complicated process that brings together a number of different skills. Keep in mind that these roles might represent one person each, one person serving several roles, or several people sharing responsibility for one area.

If you don't have the right internal resources to fill these roles, make sure you allocate budget to outsource them - at least for the initial project.

Content team

Your content team is made up of staff **within your business unit**. They will be responsible for the creation, maintenance and governance of your content. It's important that you train up or recruit for these skills.

Subject matter expert/s (SME/s)

- Responsible for accuracy of content.

Required training: **writing for the web**. Desired training: **accessibility essentials**.

Editor

- Coordinates information and feedback from SME.
- Adds content.
- Makes approved editorial changes.

Required training: **writing for the web**, **accessibility essentials**. Desired training: **accessibility advanced**.

Approver

- Empowers team to make decisions about content.
- Makes final decisions about the site and has ultimate responsibility for publishing content live.

Required training: **writing for the web**, **accessibility essentials**, **accessibility advanced**.

Project team

These are the people you will need to manage this specific project of updating your web presence. You can find them in **your business unit** or hire an external third party. Talk to digital services for advice.

Project manager

- Creates project plan including assigning roles and responsibilities.
- Locates external resources if necessary.
- Runs regular meetings with content team and record minutes of decisions made.
- Responsible for seeking approvals from director or above before go-live.
- Responsible for keeping digital services and relevant department experts outside the business unit involved in the project.

Writer

- Writes or creates content with accessibility in mind from the beginning.
- Ideally should be experts in content creation rather than subject matter.
- Responsible for proofreading and quality control of content.

Required training: **writing for the web**, **accessibility essentials**, **accessibility advanced**.

Sub-editor

- Conducts structural editing as well as copyediting, keeping accessibility in mind.
- Ideally would not be the same person as content author or subject matter expert.
- Checks content for accessibility, copyright compliance.

Required training: **writing for the web**, **accessibility essentials**, **accessibility advanced**.

3. Book in training and read guidelines

Now that you have assigned roles, it's important to ensure everyone has the skills necessary to proceed.

Before you start writing your content, it's important for your writer, approver, sub-editor, editor, and subject matter expert (if they are going to write content) complete the **training**.

Guidelines

- **How to put the user first**
- **Content guidelines**

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Lay a good foundation for your content by defining your audience, conducting an audit and developing an information architecture.

Conduct workshops and research

1. Define your audience

- Read **Put the user first** (staff only).
- Can you and your team use the **user personas** and decide together who your audience is?
- Contact your content lead to run a workshop to assist you with defining your audience. If you don't know who your content lead is, go back to **Prepare to get started**.

2. Audit your content

- Coordinate a **content audit** among subject matter experts and content owners.
- Determine verdict for each page: keep, revise or retire.

3. Develop your new information architecture (IA)

- Read **Information architecture** (staff only).
- Develop your IA and plan your content using the **IA and content plan template (XLSX 31.35KB)**
- Email content(at)detcorpcomms(dot)zendesk(dot)com for help developing your IA.

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Follow these steps to plan, write and approve content for your web pages.

Plan and create your content

1. Create a content plan

- Map your existing content to your new **information architecture (IA)**.

  - Any changes to your IA must first be approved by digital services.
- Create an **IA and content plan (XLSX 31.35KB)** detailing audience, messages and responsibilities for each page. Make sure this is available to the whole team in your shared drive you created earlier. If you have not yet created your folder structure, refer to step 4 in **prepare to get started**.
- Assign content to specific individuals to revise or write from scratch.
- Determine reasonable key dates and deadlines that the team agrees on.

2. Inform your stakeholders of changes

- Before making any changes to your site put in place change messaging to keep your users and stakeholders informed.
- Email edu(dot)nsw(at)detcorpcomms(dot)zendesk(dot)com for help from the team.

3. Write and revise your content

It is essential that you use a shared live document (Google Doc or SharePoint) to draft, edit, approve, and finalise all content.

The **very last thing** you should do in the content creation process is open AEM and copy in the **finalised** content.

- Read the **content guidelines** and write or revise content according to your content plan.
- Create a shared Word or Google doc or similar for each page.

  - Use this **simplified page template** for each page of content you require.
- When sharing the draft document use a hyperlink to your source of truth document. Don't attach documents to emails.
- Conduct regular meetings to track progress according to deadlines and address any issues that arise.

4. Edit your content

- The sub-editor conducts a structural edit in the Word or Google document saved in your shared folder structure.
- Liaise with the content owner and subject matter experts to discuss any major changes.
- Where possible, test the content with the intended user or the closest equivalent to that user.

5. Gather content approvals

- The project manager coordinates approvals for all content.
- Document approvals in Word template, saved in the shared folder structure.
- Communicate any requested changes with content authors/editor.

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Follow these steps to create your content in Adobe Experience Manager (AEM), the department's content management system (CMS).

Build your new web presence

After you have created your content and collected approvals, it's time to build your new web presence.

You must complete the relevant content management system (CMS) training before beginning these tasks.

- **Adobe Experience Manager how-to guides**
- **Adobe Experience Manager training via My PL (staff only)**

1. Create new web section

Ask the Support team to create your new web section in the CMS. Email your **information architecture (IA)** to edu(dot)nsw(at)detcorpcomms(dot)zendesk(dot)com. Allow 5 working days for this to be complete.

2. Load your content

- Editor or nominated content loader uploads approved content to CMS.
- The majority of your content will be presented as text on a standard content page. Familiarise yourself with all the options available and follow this **checklist for creating your web pages**.

3. Copy edit your content

- Sub-editor checks the copy against **content guidelines** and the **content style guide** and makes changes within the CMS.

4. Get approvals in the CMS

- During the initial project, the approver signs off content that is ready for final reviews by the digital services team.
- During business as usual, the approver completes final review and publishes content live.

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Digital services will conduct testing and final reviews to make sure your content meets legal and best practice standards.

Review and final approvals

1. Conduct pre-go-live reviews

- Contact edu(dot)nsw(at)detcorpcomms(dot)zendesk(dot)com to request a final review. The review covers:
  - user experience and accessibility
  - total quality assurance
  - design and brand compliance
  - content (high level)
- Your section will be locked down during this time (approximately 2 weeks).
- You will be given a report detailing all changes required for each page.

2. Make pre-go-live changes

- Content author/s address all critical and serious changes before go-live.
- Document all changes in the report, saved in the shared folder structure.
- Digital Experience Design will verify changes have been made.

3. Final proofread

- Sub-editor conducts final proofread.

4. Final approvals

- Project manager seeks final sign-off from all senior stakeholders.
- Document decisions in project folder.
- Business unit implements communication plan.

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Use these guidelines to maintain your content after it has gone live on the website.

Go live and maintain

1. Go live

The digital services team will publish your approved section.

2. Maintain your content

Plan to continuously improve your content, conducting a new **content audit** at least every 6 months to ensure your content is fresh.

3. Archive outdated content

Follow the Digital Profession's advice to **archive and record your content** on a regular basis.

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Helpful resources to build your website.

Resources

The following staff-only resources and guides will help you deliver the very best to our audiences.

- **Content style guide**
- **Accessibility guidelines**
- **Accessibility toolkit**
- **Accessibility training (staff only)**
- **How to write great content**
- **How to audit your content**
- **Voice and tone guidelines**

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