



McGill

Digital Standards at McGill

A guide for McGill's website and web services owners and managers



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McGill University

 @theotherlondon

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Presentation slides: mcgill.ca/x/Zjf



McGill

- Overview of McGill's web network
- Why do we need digital standards?
- Digital standards how-to
- It's launched...now what?
- Early results and next steps

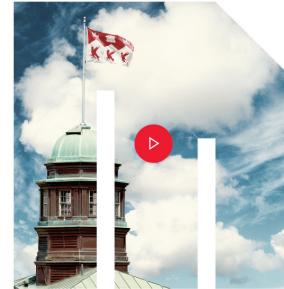
Our web network

- ~900 Drupal sites
- ~1,700 site managers
- ~8-10 million page views per month in Google Analytics
- Alexa rank: 115-200 in Canada

Made to question
the usual.
Made to find
answers.

Make your future.

[Choose your program](#)



Search for programs, people, services...



Sustainable solutions.
Made by working together.

MADE
by McGill



Tracking forest fires from space

Student researcher pieces together satellite data to help communities monitor wildfires



Creating a sustainable campus

How a student-University partnership grew into the largest fund of its kind in Canada



Tackling food insecurity

Founded by McGill undergrads, MealCare aims for food sustainability for all

Join the campaign for McGill's third century.

[Give now](#)

News

Astrophysicist Victoria Kaspi named as one of 10 'people who mattered' in science this year

Puffins stay cool thanks to their large beak

Promising discovery could lead to a better, cheaper solar cell

McGill tops Maclean's rankings for 15th straight year

Seabirds with large bills may be capable of longer flights.

Scientific instrument made at McGill reveals liquid-like properties of a solid substance

Magazine highlights McGill's dedication to research, entrepreneurial opportunities for students, diverse student body and sustainability initiatives.



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Our web network

- ~450 non-templated sites on our virtual host server
- ~100 WordPress blogs
- McGill web content on numerous external sites and systems



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HEADLINE NEWS

Negar Borghei remembered as a “sister,” and a “bright light”

Master’s candidate in Human Nutrition was one of the 176 victims who perished aboard Flight 752



HEADLINE NEWS
Let the world know how you can change it

JANUARY 16, 2020



KUDOS
Angelica Galante wins 2019 Pat Clifford Award

JANUARY 16, 2020

FEATURE: Star gazers and space travellers



HEADLINE NEWS
Spacewalk puts Saint-Jacques in rarified company



HEADLINE NEWS
CHIME telescope Fast Radio Burst project earns spot in Nature 2019 list



RESEARCH
Fast radio burst tracked down to a nearby galaxy



HEADLINE NEWS
For Jenni Sidey-Gibbons the sky is no longer the limit



HEADLINE NEWS
All safety and risk services integrated into Campus Public Safety

“The integration is an opportunity to leverage the various teams’ strengths and increase the synergies between them,” says Robert Courteau

JANUARY 15, 2020



RESEARCH
Meeting the global health challenge of worms that cause disease

Dr. Theresa Gyorkos has dedicated her career to understanding and reducing the harms caused by parasitic worm infection

JANUARY 15, 2020



HEADLINE NEWS
Interview with R2R Sponsors Diana Dutton, Leigh Yetter and Marc Denoncourt

McGill is preparing for the summer 2020 launch of new state-of-the-art integrated human resources and payroll software

JANUARY 13, 2020

HEADLINE NEWS

For Jenni Sidey-Gibbons the sky is no longer the limit

McGill Engineering alumna graduates from Astronaut Candidate to full-fledged Astronaut

JANUARY 13, 2020



McGill Reporter
“Without sharing the knowledge we develop with the media and the public, there will soon be no society to serve but only tribes to please,” writes J. Mauricio Gaona, Ph.D. Candidate at Léman McGill #McGill https://t.co/wL6qBfym9v https://t.co/SB1sE9mQzO

7 HOURS AGO



McGill Reporter
Negar Borghei, Master’s candidate who perished aboard Flight 752, is remembered as a “sister,” and a “bright light” at a memorial service held at #McGill #McGill #Flight752 https://t.co/1U7E1kWKx0 https://t.co/2e53k4d9j0

23 HOURS AGO



McGill Reporter
Angelica Galante wins 2019 Pat Clifford Award for research on plurilingual instruction that has the potential to increase student engagement among immigrant students and their Canadian-born counterparts #McGill #ElMunegg #GalanteAngelica https://t.co/kMdr03noga https://t.co/yeZVtC4QC

YESTERDAY

A photograph showing two laptops side-by-side. The laptop on the left displays a website with a light blue and white color scheme, featuring images of people and text about training and workshops. The laptop on the right displays a website for the McGill Web Management System (WMS), with a purple header, a large 'WMS' logo, and a banner image of a building with a flag. Both laptops are connected to keyboards by white cables.

Why did we need digital standards?



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Web Evolution Program vision and goals

Develop a state of the art web platform with the infrastructure, personnel and processes to grow our online brand and serve the evolving digital communications needs of McGill internal and external stakeholders.



McGill websites have **consistent, recognizable branding** that evolves with the university

Target audiences have **positive experiences with McGill.ca** and perceive McGill websites as modern and user-friendly

Faculty and staff perceive web-related services as **comprehensive and responsive to their needs**

Long-term performance and platform maintenance **costs are optimized**

Emerging needs and requirements

- Focus for our unified web service
- Resources for educating our community about McGill's standards and best practices
- A mechanism for evaluating websites and determining support requirements

Answer: Define the standards we strive to achieve when creating sites at McGill

What are digital standards?

References and principles for:

- Best practices
- Mandatory and legal obligations
- Industry standards regarding web production and other digital properties



What our digital standards used to look like...

McGill | Web Management System

Do's & Don'ts of McGill ID numbers in WMS webforms

Reviewing the rules for collecting McGill IDs

Using Tokens in WMS Webforms

Target audience: Site Administrators, Site Managers

In this article

- Current user tokens
- Context user tokens
- Submission tokens
 - Structure of a Webform Submission values token
 - Additional keys
 - Conversion key
 - Option key
 - Display-related keys (enable, islabel, iswritable, key)
 - How to use Webform Submissions values tokens
- Webform tokens
 - Get user information based on credentials
 - How to use tokens in formulas
 - Create a previous page that allows users to verify their answers before submission
 - Include information from various components in a single field

Note: The Webform Calculator module also makes use of tokens in Formula fields. However, these tokens can only be used to reference Number and Textfield components and have a different structure. To learn more about how tokens are used in formulas, see "Webform Calculator Formulae".

For your purposes, we will only be discussing Current user and Submission tokens.

McGill | IT Knowledge Base

Home Browse by Category FAQ Get IT Help Search | Back to IT Services website

Using Tokens in WMS Webforms

Article Id: 4750 Article Type: Article Article Version: 3575 Reviewed: 6/8/2018 1:14:28 PM Related Articles

In this article

Approved: Senate Board of Governors March 24, 2010 (Minute 184) Article 12, 2010 (Minute 10.2)

Effective Date: April 12, 2010

This Policy replaces the following:
Code of Conduct for Users of McGill Computing Facilities
McGill Computing Facilities Management Guidelines

Preamble

McGill information technology resources (hereafter McGill IT Resources) serve the University's mission of the advancement of learning through teaching, scholarship and service to society. The University provides an atmosphere that encourages access to knowledge and sharing of information. The University is responsible for ensuring the effective and reliable operation of our systems and protection of our information technology resources. This policy outlines the responsibilities of the University and members of the University community in the use of McGill IT Resources.

1. Definitions:

For the purposes of this Policy:

1.1. "Administrative Web Site" means those pages or sites that deal with the administrative aspects of the unit's roles and responsibilities within the institution.

1.2. "Authorized User" is a member of the McGill University community who is an employee, student, alumni, appointee or other individual who has been granted permission, by virtue of the individual's role and responsibilities, to access certain data or systems that are part of McGill IT Resources.

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POLICY ON THE RESPONSIBLE USE OF MCGILL INFORMATION TECHNOLOGY RESOURCES

Approved: Senate Board of Governors March 24, 2010 (Minute 184) Article 12, 2010 (Minute 10.2)

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McGill | IT Services Connect. Learn. Innovate.

Get help Get started System status Services & software Training & how-to Events About us

McGill.CA / IT SERVICES / Training & how-to

Information Security

What is Phishing Report a Phishing Incident McGill Password Reset Checklist Data Wiping / Media Sanitization Copyright Infringement System Cloud Service Procurement for Fund Managers Cloud Services at McGill Compromised account Data Privacy Month events - January 2020 Policies

Change your McGill Password once a year

View the [McGill Password Reset Checklist](#) for instructions and important notes.

Enter New Password: *****

Policies & Directives

- Official Policy on the Responsible Use of Information Technology at McGill (Secretariat website)
- Reporting Guidelines for the Responsible Use Policy
- IT Security Incident Response and Incident Examples

Inspiration

KEYNOTE: HILLARY HARTLEY - CHIEF DIGITAL OFFICER FOR THE PROVINCE OF ONTARIO



Session Video
<https://youtu.be/erKw4fAQleQ>

A screenshot of the Ontario Digital Service Standard website. The header features the Ontario logo, a search bar, and language links for français and English. A large image of the Ontario Legislative Building is on the right. The main content area has a teal background and displays the title "Digital Service Standard" with a "beta" badge and a small lab flask icon. Below the title, a paragraph explains the purpose of the standard, followed by a link to "Guides and resources, case studies, and related rules". The page also includes a sidebar with "On this page" sections for "Release Stages" and numbered points 1 through 14, along with links for "Why it matters" and "Contributing to the standard".

Digital Service Standard beta

The Digital Service Standard sets out 14 points to help anyone build and deliver excellent government services.

Guides and resources, case studies, and related rules

On this page

Release Stages

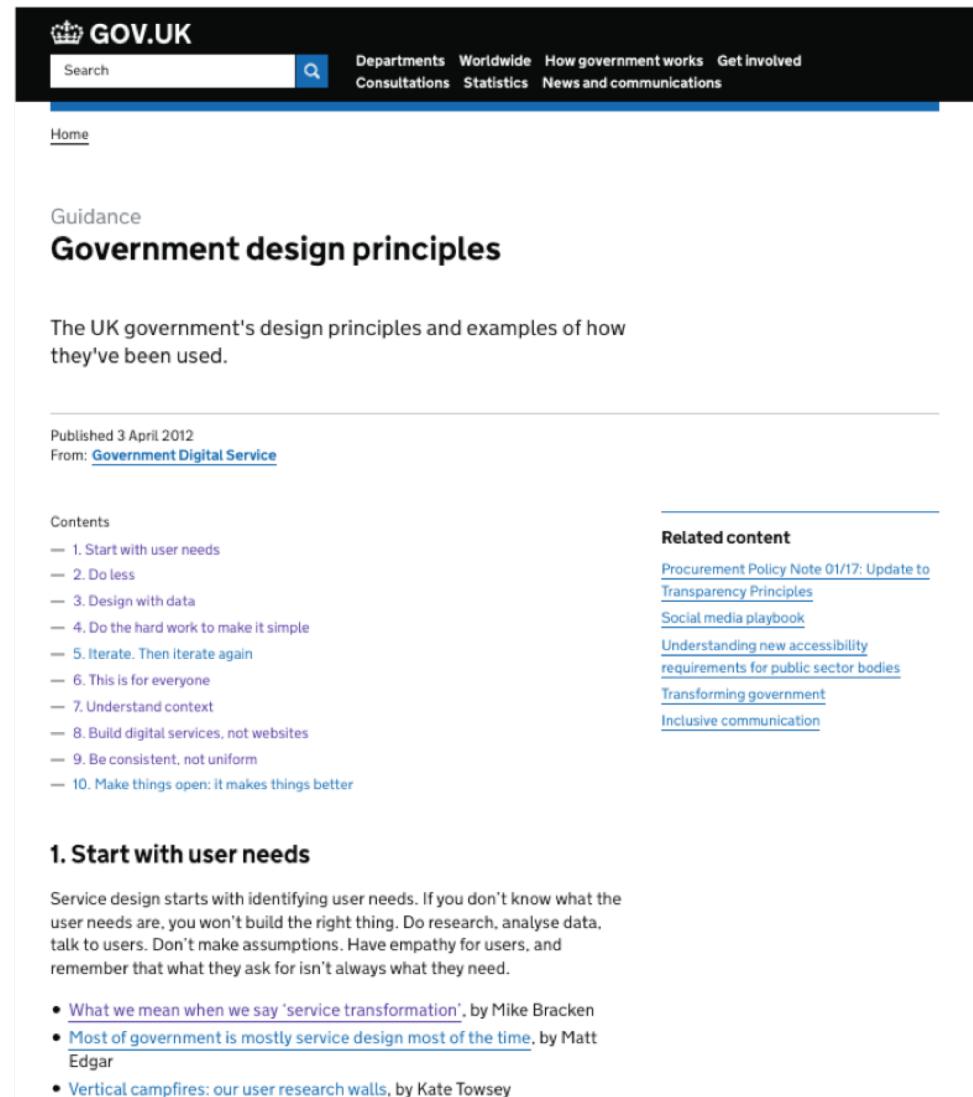
1. Understand users and their needs
2. Establish the right team
3. Be consistent
4. Design the service from start to finish
5. Ensure users succeed the first time
6. Test the end-to-end service
7. Make it accessible
8. Be agile and user-centred
9. Use open standards and common platforms
10. Embed privacy and security by design
11. Encourage people to use digital services
12. Support those who need it
13. Measure performance
14. Test with the minister

Why it matters

Contributing to the standard

More inspiration

- [Government Design Principles, Gov.uk](#)
- [Dix principes de conception, Quebec.ca](#)
- [Digital Service Standard, Government of Ontario](#)
- [Government of Canada Digital Standards](#)
- [University of London, Digital Standards*](#)
- [Oxford Brookes University, Digital Service Manual](#)



The screenshot shows the GOV.UK website's "Government design principles" page. The header includes the GOV.UK logo, a search bar, and navigation links for Departments, Worldwide, How government works, Get involved, Consultations, Statistics, and News and communications. The main content area has a "Home" link, a "Guidance" section, and a large heading "Government design principles". Below the heading is a brief description: "The UK government's design principles and examples of how they've been used." A horizontal line follows, with publication details: "Published 3 April 2012" and "From: [Government Digital Service](#)". To the right, there's a "Contents" sidebar with ten numbered items from 1 to 10. Further down is a "Related content" sidebar listing several other resources.

Published 3 April 2012
From: [Government Digital Service](#)

Contents

- 1. Start with user needs
- 2. Do less
- 3. Design with data
- 4. Do the hard work to make it simple
- 5. Iterate. Then iterate again
- 6. This is for everyone
- 7. Understand context
- 8. Build digital services, not websites
- 9. Be consistent, not uniform
- 10. Make things open: it makes things better

1. Start with user needs

Service design starts with identifying user needs. If you don't know what the user needs are, you won't build the right thing. Do research, analyse data, talk to users. Don't make assumptions. Have empathy for users, and remember that what they ask for isn't always what they need.

- [What we mean when we say 'service transformation'](#), by Mike Bracken
- [Most of government is mostly service design most of the time](#), by Matt Edgar
- [Vertical campfires: our user research walls](#), by Kate Towsey



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"Creating" digital standards



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Goals & objectives

Document the standards for McGill websites in a way that is:

- User-focused
- Informed by data
- Consistent
- Accessible
- Thoroughly researched
- Concise

Process

1. Benchmarking exercise
2. Interviews and workshops with teams and individuals at McGill
3. Digital Standards, v. 1.0 (beta)
4. Review and testing with McGill community members
5. Start defining a governance model (benchmarking)
6. Launch of the Digital Standards
7. Presentations and promotion to the McGill community
8. Ongoing evaluation and refinement

Questions for users

- What **pain points** do users of your service often encounter?
- Have we forgotten any **important details** in these standards?
- **How do people get in touch** with your team?
- Who is the **main contact person** in your unit?
- Are there any **additional people** on your team that you feel should provide input in this initiative?
- Are there any **supporting resources** that your team references that we aren't aware of?



Make standards easy to grasp and follow



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Digital Standards

mcgill.ca/web-services/digital-standards



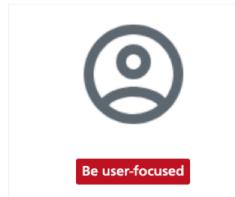
The header features the McGill logo, the text "Web Services", a "Quick Links" dropdown, a search bar with a magnifying glass icon, and a navigation menu with links to "Our services", "Resources", "Articles", "Training & events", and "Contact us".

Digital standards

A guide for McGill's website owners and managers

Our digital standards provide an overview of the criteria to be achieved when creating McGill websites and online services including:

- Accessibility requirements
- Obligations concerning website security and protecting users' data
- Usability best practices
- Optimizing website performance



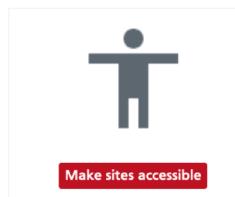
Be user-focused



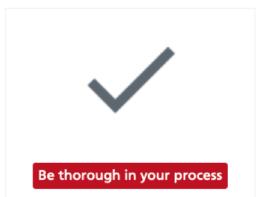
Support decisions with data



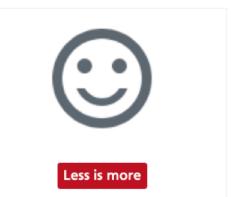
Be consistent



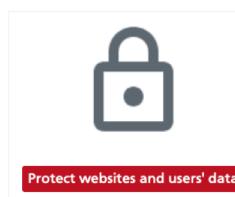
Make sites accessible



Be thorough in your process



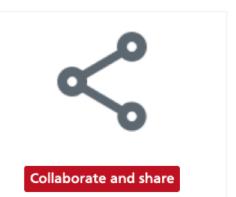
Less is more



Protect websites and users' data



Build, evaluate, revise



Collaborate and share

McGill's digital standards

1. Be user-focused
2. Support decisions with data
3. Be consistent
4. Make sites accessible
5. Be thorough in your process
6. Less is more
7. Protect websites and users' data
8. Build, evaluate, review
9. Collaborate and share

Be user focused



Be user-focused

- User-centered design **puts users at the center of every decision**
- Following user-centered design methodology will help you **tailor your website to suit your users' needs without making assumptions**
- User-centered design matters because **great digital experiences are born from considering the end-user** of your product at every stage of the conception and design process



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How to meet this standard

- Be aware of the principles of user experience research and design processes
- There are several ways to learn more about your visitors' needs, **you shouldn't rely only on usage statistics**
- Usability tests, surveys, focus groups and other exercises can help you gain valuable insights to your visitors' needs
- Work with McGill's web team to obtain guidance with user experience research and design processes

Homepage redesign

The McGill University homepage features a prominent red banner at the top with a circular seal. Below the banner, there's a news section about scholars named to the Canada Research Chairs. The main navigation bar includes links for About, Academics, Admissions, Campus Life, News, and Research. On the left, there's a sidebar with news and events, including a "Honorary doctorates" section and a "Mini-MBA" announcement. The right sidebar lists "Popular Pages" like Faculties and schools, Library, and Publications. The footer contains links for careers, virtual tours, and general information.

The McGill University homepage has a search bar at the top. Below it is a large image of a building with a flag flying. A red button labeled "Choose your program" is visible. To the right, there's a video player with a play button icon. The overall design is clean and modern.

The McGill University homepage features a "Sustainable solutions" section with three images: one of a person tracking forest fires, one of a group working on a sustainable campus project, and one of two people tackling food insecurity. Below each image is a brief description. A black banner at the bottom encourages users to "Join the campaign for McGill's third century." with a "Give now" button.

The McGill University homepage includes a "News" section with several headlines. Below the news is a "For current students" section with links to myCourses, Minerva, myMcGill, Library, Programs and courses, Resources and services, and Teaching and learning services. There's also a "For faculty & staff" section with links to Email (Outlook), myCourses, Staff directory, Human resources, myMcGill, Banner (NB), Resources and services, and Teaching and learning services. Finally, there's a "For alumni & friends" section with links to Alumni email, The McGill alumni network, Attend an event, Volunteer, Alumni benefits, Give back, MCGill News alumni magazine, and Transcripts. The footer contains links for emergency services, visiting, getting in touch, exploring, and various university resources.

Things to do

- Monitor your site analytics and address issues
- Conduct qualitative content audits at regular intervals to assess whether your content aligns your audience's needs and industry best practices
- Following user-centred design methodology, evaluate and revise your site on an ongoing basis
- Sign up for the Web Services' UX at McGill course, WS-103 to learn more

Protect websites and user's data



Protect websites and users' data

Legislation and policy

- McGill staff are subject to Quebec and Canadian laws and McGill University's policies concerning information security and maintaining the confidentiality of personal information.
- In addition, anyone who collects credit card information in an unsecure and unauthorized manner may be found in violation of financial confidentiality laws and expose themselves to legal liability.



How to meet this standard

- Create secure webforms that properly protect users' personal data (e.g. use secure formats and platforms like https, adhere to recommendations for building secure webforms)
- Do not display people's confidential information on websites
- If you become aware of unsafe practices or vulnerabilities, notify IT Security
- Keep web systems and tools up to date
- Ensure your site has a designated sponsor/asset steward
- Delete/decommission websites when they become inactive and/or are no longer of value
- Update website access permissions accordingly when your web team members change roles, leave your department or leave the university
- Use McGill usernames and passwords for authentication where possible

Make sites
accessible



Make sites accessible

Websites must strive to be accessible and inclusive to all users regardless of their gender, individual abilities, device, environment or quality of access.



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Government of Quebec accessibility standards

- Who needs to aware of these standards?
 - WMS site sponsors, managers and editors, VHOST owners and editors, basically anyone who manages or creates content for a McGill website or service
- What are the requirements?
 - See the [Web Services website](#) for information
- When is the due date for compliance?
 - July 2020

Legislation and policy

At McGill, we strive to follow the latest standards.

Inspired by the [Web Content Accessibility Guidelines \(WCAG\) 2.0](#) and published in July 2018, the new version of the [Web accessibility standards of the Gouvernement du Québec](#) now includes all public bodies covered by the *Loi sur la gouvernance et la gestion des ressources informationnelles des organismes publics et des entreprises du gouvernement*.



WCAG 2 Compliance

How to Meet WCAG (Quick Reference)

A customizable quick reference to Web Content Accessibility Guidelines (WCAG) 2 requirements (success criteria) and techniques. [Show About & How to Use](#)



Contents

Filter

Hide

1. Perceivable

- 1.1 Text Alternatives
 - 1.1.1 Non-text Content
- 1.2 Time-based Media
 - 1.2.1 Audio-only and Video-only (Prerecorded)
 - 1.2.2 Captions (Prerecorded)
 - 1.2.3 Audio Description or Media Alternative (Prerecorded)
 - 1.2.4 Captions (Live)
 - 1.2.5 Audio Description (Prerecorded)
 - 1.2.6 Sign Language (Prerecorded)
 - 1.2.7 Extended Audio Description (Prerecorded)
 - 1.2.8 Media Alternative (Prerecorded)
 - 1.2.9 Audio-only (Live)
- 1.3 Adaptable
 - 1.3.1 Info and Relationships
 - 1.3.2 Meaningful Sequence
 - 1.3.3 Sensory Characteristics
- 1.4 Distinguishable
 - 1.4.1 Use of Color
 - 1.4.2 Audio Control
 - 1.4.3 Contrast (Minimum)
 - 1.4.4 Resize text
 - 1.4.5 Images of Text

Selected Filters: WCAG 2.0: all success criteria and all techniques.

Clear filters

Expand all sections

Share

Principle 1 – Perceivable

Information and user interface components must be presentable to users in ways they can perceive.

Guideline 1.1 – Text Alternatives

Provide text alternatives for any non-text content so that it can be changed into other forms people need, such as large print, braille, speech, symbols or simpler language.

1.1.1 Non-text Content — Level A

All non-text content that is presented to the user has a text alternative that serves the equivalent purpose, except for the situations listed below. [Show full description](#)

Understanding 1.1.1

[Show techniques and failures for 1.1.1](#)

SHARE | BACK TO TOP

Guideline 1.2 – Time-based Media

Provide alternatives for time-based media.

1.2.1 Audio-only and Video-only (Prerecorded) — Level A

For prerecorded audio-only and prerecorded video-only media, the following are true, except when the audio or video is a media alternative for text and is clearly labeled as such: [Show full description](#)

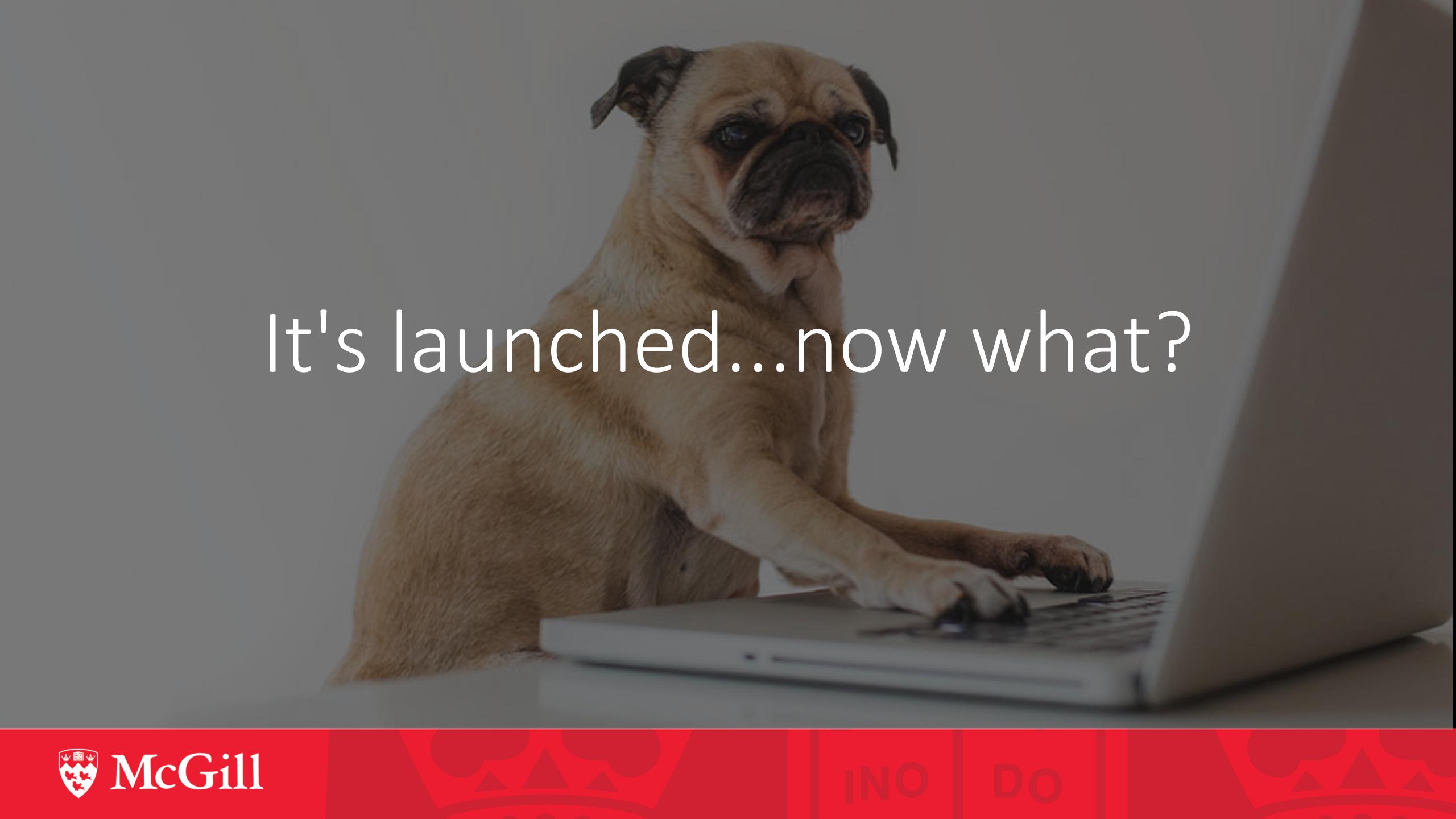
Understanding 1.2.1

[Show techniques and failures for 1.2.1](#)

SHARE | BACK TO TOP



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A pug dog is sitting at a desk, looking at a laptop screen. The dog is brown with a black mask and ears. The laptop is open and facing the dog. The background is a plain, light-colored wall.

It's launched...now what?

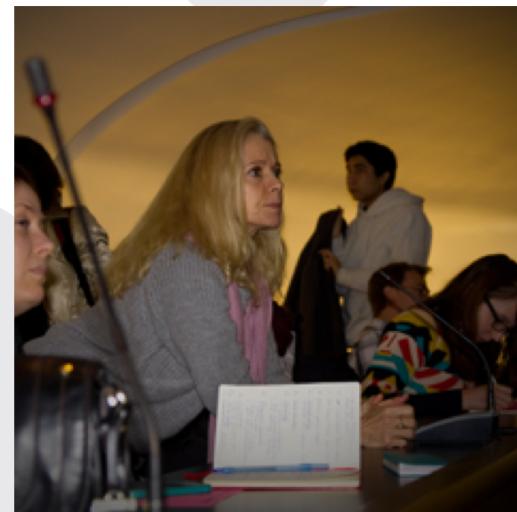


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A red decorative graphic featuring a repeating crown or leaf-like pattern.INOA red decorative graphic featuring a repeating crown or leaf-like pattern.DO

Governing digital standards

INNOVATE
DO MORE



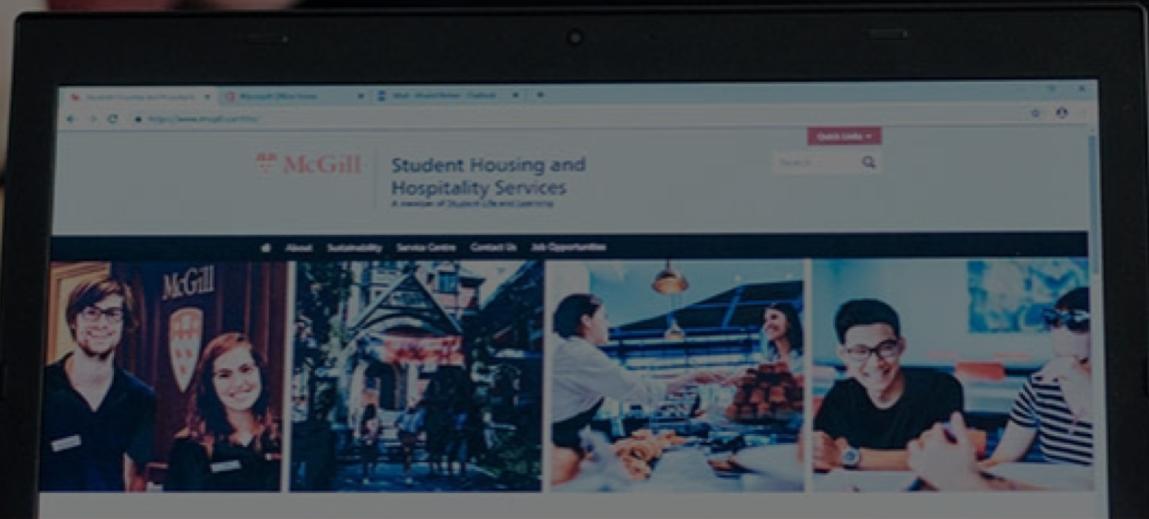
Governance benchmarking



Governance questionnaire

- Do you have controls and/or processes in place to manage compliance with policies and standards on your university websites?
- On a scale of 1-5 with 1 being “not at all effective” and 5 being “completely effective” how effective are these controls and/or processes?
- What changes do you think you could make to your processes to improve compliance with your standards and policies on your websites?

Training & resources



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Spreading the word about our digital standards

- Extensive supporting documentation available online
- Ongoing promotion in monthly newsletters
- Links to resources in support staff communications with clients
- Content in multiple training courses (some mandatory)
- Messaging in community presentations and at Web Services meetups

Early results and next steps



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Response from the McGill community

- "Thank you for running this initiative - I think it will go a long way towards making websites more standardized at McGill and helping WMS site managers connect and collaborate."
- "This is a great initiative and a very thorough, well-formulated resource for our community!"
- "It is exciting to see such positive initiatives of inclusivity in motion within the McGill Community."

A photograph showing two laptops on a desk. The laptop on the left displays a website with sections for 'TRAINING & WORKSHOPS' and 'VIEW MORE'. The laptop on the right displays a page for 'WMS' (McGill Web Management System) featuring a large image of a building and text about its features.

Impact on our websites



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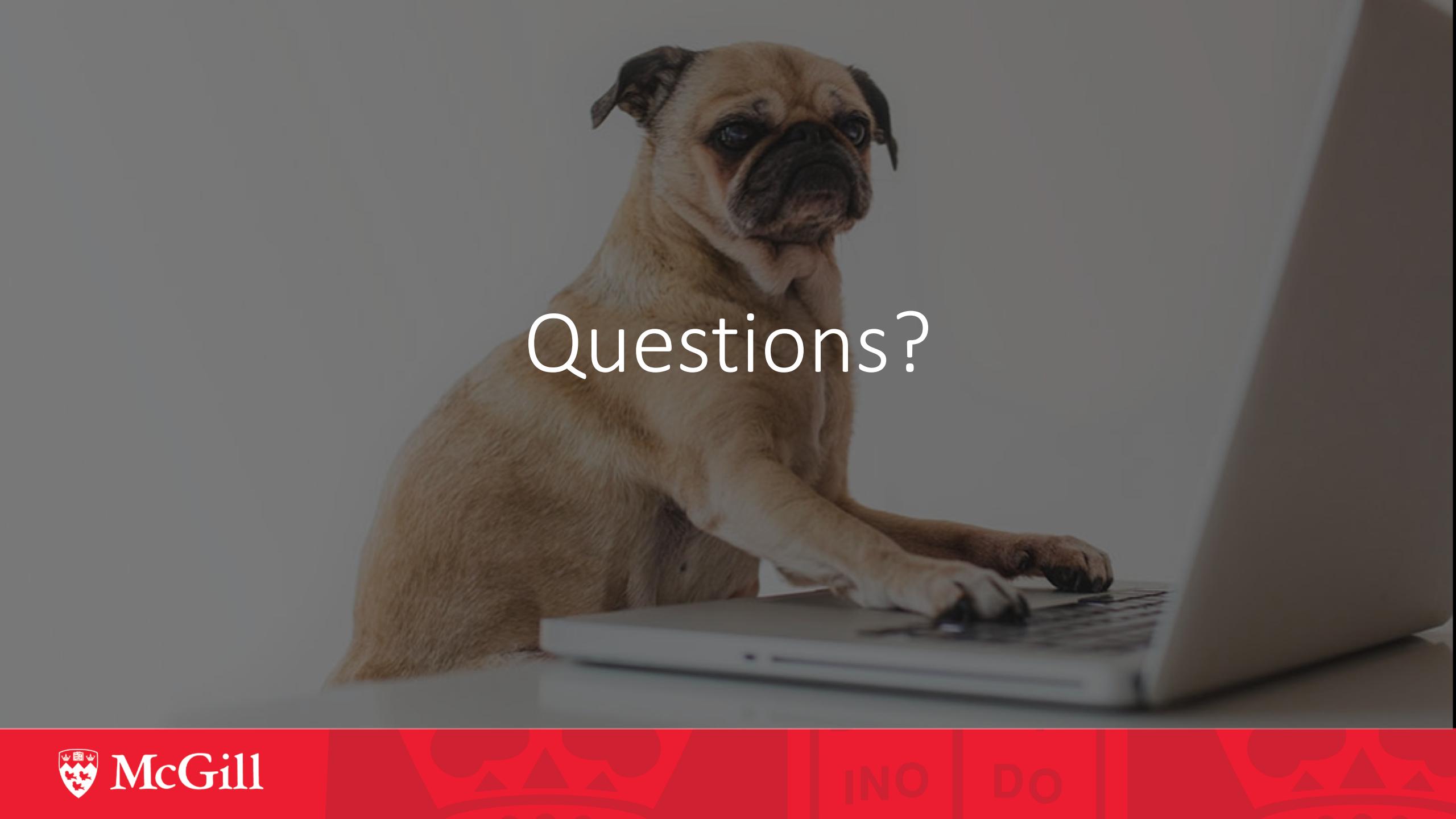
INO

DO

Related links

- [McGill's Web Services website](http://mcgill.ca/web-services) – mcgill.ca/web-services
- [McGill's digital standards](#)
- Other presentations you might want to check out:
 - [Our 2019 year-end presentation to the McGill community](#)
 - [Case Study: How & why Drupal powers 900 websites at McGill University – 2019 presentation at DrupalCon Seattle](#)
- Presentation slides: mcgill.ca/x/Zjf



A pug dog with a light brown coat and dark brown facial features is sitting at a desk, looking towards the right side of the frame. It appears to be interacting with a laptop computer. The background is a plain, light-colored wall.

Questions?