Content Organizing Process Instructions

The visionLive CMS has a powerful permissions system that controls which users in your organization have access to edit the various content on your website. This guide works through the most common configuration, permissions based on an employee's (user's) department. Using the department-based approach, all users in the same department will have access to manage content assigned to their department. Users do not have access to manage content assigned to a different department.

Step 1: List Your Departments

Using the Department List tab, identify all of the departments in your organization. For example:

- City Clerk
- Mayor's Office
- Parks & Recreation
- Police

Larger departments in larger organizations are sometimes subdivided. For example:

- Parks & Rec: Public Parks
- Parks & Rec: Recreation Complex
- Parks & Rec: Senior Center
- Parks & Rec: Youth Programs

Step 2: List Your Website (CMS) Users

Using the CMS Users tab, identify all current users to be configured in the CMS. Please note that users can easily be added later as personnel changes occur. A user is someone that needs to have access in order to manage content on the website. Each user should have his or her own account.

1. Please provide the first and last names, a user name, and email address for each user.
2. Please list the department to which a user belongs. If a user belongs to more than one department, use multiple lines to list the user for each department.
3. List the user role for each user for each department to which the user is assigned
    - **Editor:** the user is allowed to create new content and edit existing content for their assigned department(s) but the user cannot publish the content. In other words, they cannot make the new/edited content live and visible to the public themselves. Instead the content must be reviewed and approved first.
    - **Publisher:** the user is allowed to perform all editor functions as well as publish content for their assigned department(s).
    - **Super User:** the user has system-wide access to create, edit, and publish all content for <u>all departments</u>. This role should be limited to a select few users within the organization

Step 3: Associate each page on your website with a department

Your project manager will provide you with a sitemap of your current website. Using Column G on the Current Sitemap tab, list the department to which each page belongs.

See "Explanation of Sitemap" below for details about how the sitemap spreadsheets work.

Every page must be assigned to a department. For miscellaneous pages, they are often assigned to the department which has overall responsibility for the organization's website, such as the Communications or IT departments. For pages that may be managed by more than one department, specify the primary department for the page. You may also make note of those pages and discuss advanced configurations with your project manager.

Step 3B: Review Current Sitemap

Review the Current Sitemap tab to ensure that it is accurate and complete. This will be used by your project manager to prepare a proposed sitemap which will eventually be used as the specification for content migration. Any page that is missing from the sitemap will not be migrated.

Explanation of Current Sitemap

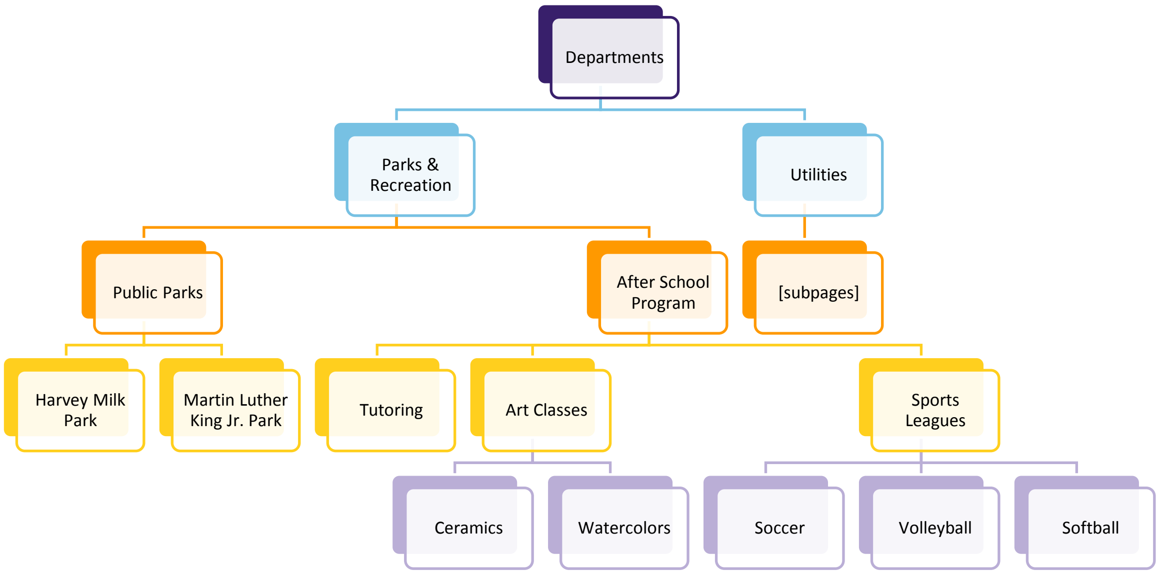
The sitemap spreadsheet is a way of indexing the content on your website. It identifies the unique URL for every page on your site as well as the taxonomy (page/subpage relationship) of how different pages relate to each other.

Instructions on using Format Painter/link to video

The **Navigation Name / Level** column is the page's title. The color coding and indenting in that column establishes the taxonomy. For example, the Departments section of a sitemap might look something like this:

Departments
Parks & Recreation
Public Parks
Harvey Milk Park
Martin Luther King Jr. Park
After School Program
Tutoring
Art Classes
Ceramics
Watercolors
Sports Leagues
Soccer
Volleyball
Softball
Utilities

Another way to picture it is like this:



The **Location** column is the full URL of the page. On the Proposed Sitemap, this could also be the name of a Word document. Your project manager will communicate further instructions if Word documents will be used for your project.

Step 4: Review the Proposed Sitemap

Your project manager will prepare a proposed sitemap that incorporates your current sitemap into the main navigation headings that were decided upon during the homepage wireframe process. Using the Proposed Sitemap tab, review and finalize the sitemap by making any additions, subtractions, or alterations that you desire. Make sure each page has a Department listed in Column H. Identify all pages to be migrated by the Vision team in Column I.

Explanation of Proposed Sitemap

The **Migrator Notes** column is used by Vision's content migration team and will included information that requires client review and finalization such a links that are not working.

The **Vision to Migrate** column tallies the number of pages to be migrated by Vision. The tally should not exceed the total number allowed in the project scope, as shown in Cell I4. In most cases, insert a 1 in this column because generally, 1 page URL = 1 page of content migration. Under certain circumstances, this number will be increased, depending upon the type and amount of content on the specific page.

Type of Content	Pieces-of-Content: Page-Equivalent
Pages	1:1
Documents (when many are linked on a page)	20:1
Business Listings (no formatting/images)	10:1
Business Listings (with special formatting/images)	1:1
Business Listings pre-exported to CSV	Number of Content Groups:1
Calendars (no formatting/images)	10:1

Calendars (with special formatting/images)	1:1
Calendars pre-exported to CSV	Number of Content Groups:1
Facilities Listings (no formatting/images)	5:1
Facilities Listings (with special formatting/images)	1:1
FAQs	10:1
Forms	1:1
News (no formatting/images)	10:1
News (with special formatting/images)	1:1
News pre-exported to CSV	Number of Content Groups:1
Photo Album	20 images:1
Staff Directory Listings	10:1

For example, a page with up to 20 documents on it will equal 1 page of content migration. If a page has 21-40 documents on it, it will equal 2 pages of content migration.

The **Page ID** and **Component/Redirect/Connect** columns are used by your project manager on an as-needed basis depending upon your project's specific needs

Step 5: Review Department Component Access

Using the Department Access tab, review and update to components to which each department has access. Your project manager will pre-populate this with configurations needed for content migration.

- Place a **P** in a cell to indicate that the department has access to use the specified component and users within that department can publish content directly without approval. This is commonly configured for Images and Documents.
- Place an **A** in a cell to indicate that a department has access to use a specified component but users within that department need to have the content approved before it can be published.
- Place an **X** in a cell to indicate that a department does not have access to us a specified component.

Please consult your project manager for any cases where you wish to change a **P** or an **A** to **X**.