Best Practices guide

For IN.Gov Webmasters and Content Managers

**The Goal of the IN.gov Best Practices Guide**

The IN.gov Web Content Manager is responsible for maintaining and growing their website. The role entails more than just putting content on pages and letting it stand on its own. A Web Content Manager must keep an eye on interactions to ensure the content is relevant and easily viewed without impediments to the visitor.

This is done through monitoring all aspects of their website including content, analytical reports, and visitor traffic. It is important to identify issues and to adjust accordingly. Our job is crucial to our agency. A website is an invaluable vehicle to reach the citizens an agency supports as well as serve as a recruiting tool for potential employees.

This guide should be used by new and existing web content managers as a road map to fulfill the responsibilities of their position. Each agency is responsible for maintaining the quality of content within their sites. This is paramount for maintaining an effective web portal and ensuring information is timely and accurate.

This document is the product of the collaborative effort of the IN.gov User Council, IN.gov staff, and additional web content managers from various agencies. It is expected to evolve with time and serve as the source of knowledge for all web content managers of sites hosted within the IN.gov web portal.

Web content managers are encouraged to contact the IN.gov staff with comments and suggestions regarding the content of this Best Practices Guide. With the assistance of all stakeholders, we will continue to maintain the highest of quality across all affiliated websites.

The guide includes the following sections:

* Note to Agency Communications Directors and Executive Staff
* Web content manager Responsibilities
* Web content manager Support and Resources
* Applications Available for Agency Websites
* Helpful Information

**Note to Agency Communications Directors and Executive Staff**

The IN.gov Web Portal has been recognized nationally for providing an award-winning digital experience for its visitors. This is only possible through continued partnership with every agency, including the support of agency leadership.

We appreciate agencies doing their best to manage their websites with the resources available to them. It is important to continue moving forward by ensuring all websites within the portal are informative, accessible to all visitors, and free of any impediments such as broken links and misspellings. In addition, page analytics should be used to create a meaningful website experience for the visitor. All of this can be done with the tools we provide at no additional cost to agencies. It only requires the effort of whoever performs the role of your agency’s web content manager(s).

The IN.gov Best Practices Guide is intended to highlight the importance of the web content manager and webmaster positions by providing an activity baseline. Having a web content manager in your agency is vital for your communication efforts. This is especially true living in a digital world where everything and everyone is connected to the internet. Again, we appreciate our continued partnership in making the visitor’s experience informative and enjoyable.

**Web content manager’s Responsibilities**

This section was developed with the assistance of a webmaster who has worked for two state agencies. Years of knowledge and experience were leveraged in the development of the list. However, the information provided should only be used as a minimum standard baseline. Think of it as a basic template of work to be accomplished.

No two agencies are the same, so it is important to consult with your agency’s Communications Director or whoever is ultimately responsible for approving website content. However, as web content manager, maintaining the quality of your agency’s website is now your responsibility.

IN.gov completes quarterly scans on IN.gov websites; however, the IN.gov team focuses on global/template issues that fall outside of the control of agencies. Each agency is responsible for the content within the pages, including any HTML/code/files they have placed on the page, and agency users are granted access to the IN.gov provided accessibility product, Siteimprove, to review any issues that may have occurred after content revisions.

The focus of an agency’s web content manager is to constantly improve and/or maintain the quality of your agency’s website. To do so we encourage every web content manager to take advantage of all the web management tools made available to you. A full list is available within this document and is also published at [IN.gov/INWP](https://www.in.gov/inwp/).

***Start:***

* Create a metric spreadsheet to track website performance of:
  + Google Analytics – Page Views, Unique visitors, search queries
  + Siteimprove – 508/ADA Compliance, Quality Assurance on broken Links and misspelling
  + GovDelivery – Open and click rates on communications
  + A template is available here: <https://www.in.gov/inwp/files/metricspreadsheet_sampletemplate.xlsx>
* Form a team to do quarterly website content reviews (multiple teams for different programs)
* Join the Mentor Program and set up an initial meeting with your mentor; decide how frequently you would like to meet
* Review all FAQs to ensure content is still accurate
* Use Siteimprove to remediate 508/ADA accessibility issues and clean up all broken links and misspellings
* Use Google Analytics to review the top 10-20 pages viewed on your website
* Create a planning calendar for scheduling posts and updates. If one exists, review and ensure recurring events are accurate
* Review agency events calendar and ensure all events are accurate
* Develop or review your agency’s communication strategy: What meetings must be posted? What events are no longer pertinent?
* Review all GovDelivery content watches and subscribers. Is there a subscribed audience that the agency is not communicating to?

***Weekly***:

* Check in with your supervisor to see if there are any tasks on deck and whether there is anything important happening or expected to happen related to your agency
* Check in with people on your team for collaboration if needed
* Weeks will vary depending on the "fires" and projects going on
* Run a Siteimprove Quality Assurance report for the entire site (accessibility compliance issues, spelling errors, broken links, etc.)
  + This can also be bi-weekly
* Review Funnelback to see where search term trends are, how to improve search results, etc.
  + This can also be bi-weekly
* Adjust/update the planning calendar (see annual task for setup)

***Monthly***:

* Review Google Analytics, looking for trends and search trends, top access pages, follow through on the path users go on your website, get an idea of how to improve (i.e. reduce having to go through multiple pages to find things)
* Review 508 accessibility compliance issue resolution progress on Siteimprove
* Complete monthly media reports including the IN.gov websites (reports can easily be generated using Google Data to share with senior staff so they can see trends, point out improvements, etc.)
* Check in with your leadership regarding "what lines of business will I have to interact with on a monthly basis?"
* Attend the IN.gov User Council meeting if a member
* Set aside some time to view the websites maintained by other agencies

***Quarterly***:

* Review Google Analytics trends between quarters
* Check in with main lines of business (i.e., check in with policy team to make sure content in their respective section of the website is in order or needs updates/removed)
* Conduct a quarterly review between the agency web content manager and IN.gov team
* Participate in webmaster continuing education, whether it is formal or a free online class
* Review all FAQs to ensure content is accurate
* Review website sections and pages for accuracy and relevancy

***Annually***:

* Create a yearly report from the different platforms (Siteimprove, Google Analytics, Funnelback)
* Refresh the planning calendar for the next year
  + Look at the previous quarterly reports for different trends in the different times of the year
* Review entire site: consistency, branding standards met, revamps needed, etc.
* Meet with NIC Indiana for annual website review
* Plan content refresh for the new year

**Web content manager Support and Resources**

***Mentor Program***

For all new web content managers to the IN.gov web portal, there is a mentorship program available to you. Mentors are experienced webmasters from another state agency and will be an informal resource for you, whether you have a question about the CMS or need to know who to contact regarding a particular topic. Contact the IN.gov Team if interested in joining or serving as a mentor.

***User Council***

The IN.gov User Council serves the IN.gov program, providing feedback for portal services before, during and after formal deployment. The Council and its members are charged with the following:

* Monitor and update their own agency websites and share best practices
* Champion the IN.gov Program and make use of provided applications available for agency websites
* Provide feedback and perform user testing as requested for the Indiana Office of Technology (IOT) and the IN.gov Program
* Collaborate with webmasters and content managers across agencies to promote common web practices
* Attend monthly meetings
* Contribute on the User Council Teams Channel

Membership in the User Council is by request and is limited to one representative per agency. If Web content managers are interested in attending and there is no agency representative currently on the council, please email a request to Mike White and Emily Davis ([INgovManagement@iot.in.gov](mailto:INgovManagement@iot.in.gov)).

To qualify for council membership, Web content managers must commit to attending monthly User Council meetings and fulfilling the responsibilities of the council outlined above.

***IN.gov Team Resource Contact Information***

Whether you have been managing web content with the state for a long period of time or are new in this role, finding the right person or place to go to ask a question or find an answer can be cumbersome. Please feel free to reach out with any questions regarding the IN.gov program, web portal, webmaster related topics, and any other inquiries: [INgovManagement@iot.in.gov](mailto:ingovmanagement@iot.in.gov)

**Applications Available for Agency Websites**:

The services described in this section are considered Statewide Solutions. All these services are free for standard use, including implementation and support. Training is also available for these applications via the request form below. This list is of current applications available to use and is subject to change.

* + Solutions Training: <https://www.in.gov/inwp/training/>

***Access Indiana*** - A single sign-on authentication mechanism and Identity Provider for public online applications for the State of Indiana. The IN.gov team can help an agency integrate their application with Access Indiana to take full advantage of single sign-on authentication and associated security benefits. In addition, the Access Indiana portal contains a Services dashboard with links to multiple Indiana online services, providing citizens one-stop shopping for their State of Indiana needs.

* Learn more: <https://www.in.gov/inwp/applications/authentication/>
* Login: <https://access.in.gov/signin/>

***Application Development*** – The IN.gov team develops robust applications that can authenticate, collect, store, and report information for anything. This is a full lifecycle service that includes project management, business analysis, user interface design & development, backend/service design & development, quality assurance testing, security testing, load testing, user acceptance testing and deployment.

* Accessible at: <https://www.in.gov/inwp/applications/>

***Application Style Guide*** - This is a general style guide outlining the base styles for applications related to IN.gov and Indiana state government. The guide is broken up into four sections: General Styles, Header, Typography, and UI Elements.

* Style Guide: <https://www.in.gov/inwp/app-style-guide/>

***Browse Aloud*** - A free software that reads web pages out loud. It can help anyone who has difficulty reading online, including people with mild visual impairments, low literacy, English as a second language, or learning disabilities such as dyslexia.

* How to install: <https://www.in.gov/inwp/tools/accessibility-screen-reader/>

***Calendar*** - A unified master calendar of news releases and activities for the State of Indiana where the public can find the most current and up-to-date information available within the State. It also provides agencies the ability to syndicate and access views for only their agency calendar entries.

* Calendar Training: <https://www.in.gov/inwp/tools/calendar/>
* Request access/Report an issue: <https://www.in.gov/inwp/tools/calendar/request/>

***FAQs*** – Using the State Information Center (SIC) agencies can post FAQs to help citizens find relevant information faster and easier, with over 3,000 FAQs submitted to date.

* FAQ information: <https://www.in.gov/inwp/tools/faqs/>

***Google Analytics*** – A tool that provides insight on page popularity, user visit length, the number of document downloads, browser use, and much more via user-friendly dashboards, historical data tables, and real-time visitor activity. Google Analytics can quickly generate reports that can be shared with non-Google Analytics users.

* Learn more: <https://www.in.gov/inwp/tools/analytics/>
* Request access: <https://www.in.gov/inwp/training/>

***GovDelivery*** – A service that allows IN.gov visitors to subscribe to email and text alerts for both agency web content updates and bulletin releases. The base service is provided to state agencies by the IN.gov Program at no cost. Agencies may opt-in for a fee to the GovDelivery Advanced Network which provides the agency with greater flexibility in developing its communications and subscriber networks and has been shown to increase organic subscriber growth.

* + Learn more: <https://www.in.gov/inwp/tools/bulkemail/>
  + Training access: <https://support.granicus.com/s/>

***GovLinks*** – A tool that creates short URLs that can be tracked for analytics, to gauge effectiveness, and message reach per platform. These links are tracked in Siteimprove (see below).

* + Request access: <https://www.in.gov/inwp/tools/linkshortener/request/>
  + Additional documentation: <https://www.in.gov/inwp/tools/linkshortener/>

***Mapping Services -*** IN.gov offers a wide range of mapping services to help fit the needs of any agency. Through its innovative mapping tools and custom development, IN.gov can build the mapping solution you need to improve the constituent experience online.

* + Learn more: <https://www.in.gov/inwp/tools/mapping-services/>
  + Project request: <https://www.in.gov/inwp/tools/mapping-services/request/>

***Microsoft Teams*** – A Microsoft productivity and collaboration tool that allows for IM chatting, virtual meetings, and the creation of teams and channels with Microsoft Office 365 file sharing and collaboration, organized communication, and app integration.

* Request a Microsoft Team: <https://ingov.sharepoint.com/sites/WorkSmart365/Lists/Office365GroupRequestForm/NewForm.aspx?Source=https%3a//ingov.sharepoint.com/sites/WorkSmart365/SitePages/Thankyouforyourrequest.aspx&RootFolder=/sites/WorkSmart365/Lists/Office365GroupRequestForm&web=1>

***Online Forms*** - IN.gov offers two online form services for agencies looking for a way to gather information from their visitors. These online forms can provide a way to quickly engage with your audience, collect data, process payments, and replace any legacy PDF or mail-in form

* Request form: <https://www.in.gov/inwp/tools/online-forms/>

***Payment Processing*** - The payment processing services have been tailored for the unique requirements of Indiana and its governmental entities. For more information regarding available options, please email [INgovManagement@iot.in.gov](mailto:INgovManagement@iot.in.gov) with your inquiry.

* Learn more on both vendors: <https://www.in.gov/inwp/payment-processing/>

***Search Services*** - Advanced search services for websites, intranets, directories, databases, and other digital assets. Currently the state uses Funnelback to support Search Services. This tool allows for custom search and result page designs, type ahead suggestions, keyword highlighting as well as analytics and auditing tools for SEO, accessibility, and content.

* Learn More: <https://www.in.gov/inwp/tools/search-services/>
* Login: <https://admin.search.in.gov/d/auth/login>

***Siteimprove*** - Siteimprove offers quality assurance to agencies through identifying 508/ADA accessibility issues, spelling mistakes, and broken links as well as providing a complete overview of resources.

* Learn more: <https://www.in.gov/inwp/tools/qa-and-accessibility/>
* Request access: <https://www.in.gov/inwp/tools/qa-and-accessibility/request/>

***Web Content Management System (CMS)*** – A tool used by agency Webmasters and content managers to create, update, and publish their websites and pages. IN.Gov currently uses Squiz Matrix for WebCMS.

* + Learn more: <https://www.in.gov/inwp/tools/cms/>
  + Request access: <https://www.in.gov/inwp/tools/cms/access/>
  + Request support: <https://www.in.gov/inwp/tools/cms/request/>
  + Training resources: <https://cms.in.gov/cmsreference/>

**Helpful Information:**

***New Project*** *-* If your agency is interested in developing a new online service, follow the link below:

* <https://www.in.gov/inwp/applications/new-project/>

***Standard Application Header Request*** - This form is to request anything related to the Standard Application Header.

* <https://www.in.gov/inwp/applications/support/standard-application-header/>

***Agency Content/Graphics Requests*** - This form is to request assistance with maintaining non-interactive portions of their web presence such as HTML, JavaScript, CSS, graphics, images, and simple email contact forms.

* <https://www.in.gov/inwp/tools/cms/request/>

***IN.gov Homepage Promotional Items*** - Promote your agency campaign or event on the IN.gov homepage. Requests will be reviewed and approved by the User and Governance councils.

* <https://www.in.gov/inwp/contact-us/request-ingov-promo/>

***IN.gov Suggestion Box*** - If you have a suggestion that you feel can improve the IN.gov experience, us the Suggestion Box to submit for review:

* <https://www.in.gov/inwp/contact-us/suggestion/>

***New Website or Website Redesign Request*** - As agency needs change over time, the IN.gov Program is available to assist with the development of new program/initiative websites and website redesigns. If your agency has a need for a new or improved website, please complete the following form in its entirety.

* <https://www.in.gov/inwp/websites/request/>

***Web 2.0 Social Media Requests*** - If you are interested in implementing one or more of these services, please complete this form in its entirety.

* <https://www.in.gov/inwp/contact-us/social-media-requests/>

***Deactivate Website*** – If your agency no longer needs a specific webpage, please submit the following form to deactivate the site.

* <https://www.in.gov/inwp/applications/support/deactivation-request/>

***State Domain Services –*** If you need a new third-level or fourth-level IN.gov domain, or a new .org, .net, .com, etc., submit your request at the link below. Third-levels and non-IN.gov domain requests require approval by both the Director of Communications and External Affairs and the Executive Director of IN.gov. Third-level domain requests are usually only for multi-agency or Governor’s Office initiatives. Fourth-level domains require approval by the Executive Director of IN.gov and are rarely denied.

* <https://www.in.gov/inwp/state-domain-services/>

***Local Government Web Services*** *-*This portion of the portal is for local government agencies looking to host with IN.gov and host their MX records There are 5 links available for local government agencies to request IN.gov domains, update IP address, request an SSL certificate, MX records, TXT records, or to have the DNS delegated to the management of their choice:

* <https://www.in.gov/inwp/local-government/>

***Record Transmittal Procedure*** - The Indiana Archives and Records Administration (IARA) may only accept records that are scheduled for permanent retention. Prior to accepting a delivery, an agency representative (generally the Director or Records Coordinator) needs to complete and submit a State Form 48883 Request for Transmittal for each record series that will be sent. Please see the Record Coordinator’s Handbook for more detailed information.

* State Form 48883 and additional information can be found at: <https://www.in.gov/iara/2799.htm>
* Types of files accepted by the IARA: Paper, Network transfer, SFTP, Sync service (e.g. Syncplicity), Dropbox, Secure email, Removable media (e.g. USB)
  + For SFTP and network transfers, IARA can either pick up files from the sender or grant the sender access to a drop location. These details can be arranged with Electronic Records staff in advance of the transmittal. Records containing sensitive or confidential information (PII, HIPPA, etc.) should NEVER be submitted via unsecured email. Regardless of how they are delivered or their confidentiality, any encrypted or password-protected records submitted to the Archives MUST INCLUDE any applicable login credentials or other information needed to access and download the files

***General Inquiries*** *-* If you have questions, suggestions and/or are unable to find an appropriate category, please use the General Inquiry form:

* <https://www.in.gov/inwp/support/general-inquiry/>

**Conclusion**

On behalf of everyone who supports the IN.gov web portal, we thank you for taking the time to view this document. We hope you find it useful as a baseline as you fulfill your role as an agency web content manager. Together we must strive to ensure all web content is relevant, informative, and free of any barriers that will hinder the end-user in their search for information. Please remember that maintaining the state’s web portal is a combined effort of all who are involved, including all agency communications directors and web content managers, as well as IOT and NIC Indiana staff.

Best regards,

Indiana Office of Technology, IN.gov Web Portal