

- ◆ Follow these recommended best practices when working with an approved vendor for website provisioning, development, or migration in the Cascade Standard Template Version 3.



WEB TEMPLATE

If your new site will use the university's **Standard Web Template Version 3** and leverage the available features and functionality within the CMS, the current feature set of the standard template can be found at <http://template.emory.edu/cpa/documentation/standard-v3.html>.

CLIENT MEETING

It's important to have a client meeting before you begin your project. Keep these ideas in mind as you prepare for your kickoff.

- Introductions and who is main point of contact?
- Who is audience?
- Timeline
- Content (Where is it coming from?)
- Design
- Expectations
- Next Steps

SITE PROVISIONING

To have a new standard template site set up in Cascade, go to the Emory Office of Information Technology (IT) Web Hosting site.

- Under Make a Request, choose [Web Hosting](#) (Add, Move, Remove)
- If you are migrating your current site, in the dropdown menu choose Move current site to a new template.
- If you are creating a new site, in the dropdown menu choose Add site to a new template.

DOMAIN NAME REQUEST

By university policy, all domain names for Emory websites must be approved through the Domain Name Request process. [Review guidelines and instructions for requesting a domain name.](#)

DISCOVERY

Discovery can be performed to create a unified communication strategy for the client that addresses key audiences and expresses the specific ethos of the client while being integrated with the messaging and brand strategy of Emory University. Discovery is recommended when initiating a new website for development.

Discovery Can Include:

- Branding workshops and listening sessions (stakeholder interviews and focus groups) to learn the unit's purpose, vision, value, platform audiences, and personality
- A review and analysis of the client's print and digital collateral
- A competitive analysis of the client's existing web presence and up to five peer sites

Allocated Project Time: 2–4 months, depending on the discovery elements included

CONTENT

You should have your content ready for use (or updated) before the project kicks off. New content should be submitted as Word documents. Content and content strategy should support the client's brand and organizational goals and communications platform. And remember, regularly updating your content is one of the best ways to improve your SEO.

Content Activities Can Include:

- Content audit involving a high-level taxonomy and using content collection documents for page-level subject matter

Allocated Time: 2–3 weeks depending on the size of the existing site

- Creation of information architecture (navigation and hierarchy) using card sorting and alignment with persona needs and competitive analysis findings

Allocated Time: 1 week; can include working sessions with client

- Consideration of copy and visuals including photography, video, forms, and graphics
- Writing new content or modifying old content to fit the new site

Allocated Time: 2–4 weeks; depending on the amount of copy needed

DESIGN

During kickoff or discovery, team members will discuss appearance and functionality needs for your website from custom to templated options. Some needs are reflected in header elements, image selection, and color use, while others are reflected in understanding what your content covers and how it needs to be provided to site visitors. Development cannot begin without design sign off. Sharing examples of other websites that have features you like is helpful.

- **Deliverables:** It is useful to ask a vendor to provide 3–5 designed page types to be approved before development begins.

Allocated Project Time: 15–25 business days

CONTENT MIGRATION

This is the step where the content is entered into Cascade.

Content Migration Steps Can Include:

- Building content for navigation block (information architecture)
- Building content for footer block
- Adding all page content
- Marking up content documents for web components

DEVELOPMENT

After design approval, development can begin on your site. It is tempting to begin content migration before design approval has been finalized but doing so can drastically affect the ease of completing your project. Page building with new or migrated content frequently reveals additional requirements that can lead to custom design and may extend your schedule.

The Cascade Development Process Includes:

- Determining page types from design
- Determining components from design
- Creating example “kitchen sink” of components page and other page types as sample content for training and QA purposes
- Functional testing
- Rewriting CSS/Velocity/JavaScript if changes need to be made from accessibility review and functional testing
- Creating user documentation

SITE TESTING

QA – There are three phases to our QA process: content proofing, functionality/responsiveness, and the accessibility scan. Before the last two phases can begin, content must be completed. There will be a halt to content changes during QA, but they can be resumed after launch. After this content freeze is in place, functionality and responsiveness should be tested on multiple devices. There is a lengthy accessibility scan, and the issues revealed there are analyzed and corrected.

Allocated Project Time: 10–20 business days

Redirects – If an existing site is being migrated, a list of redirects must be submitted by those building the content, as they are most familiar with the old content and how that content maps to the new pages of the site. Note: this can only be completed once the new site structure and pages have been finalized.

Launch – To ensure a site meets with your approval and you are happy with how the site appears and works, we ask for a launch sign off one week prior. If something is wrong, this is the last opportunity to address it before launch. Content changes up to and including image changes should not be the reason to delay launch. You should be trained to make content edits.

Allocated Project Time: 1–2 business days (several tasks are completed for this milestone)

TRAINING

Emory University uses a content management system. Via Zoom, a trainer shows users how to log in and view site content, add and edit pages, upload images and documents, page types, content rows and blocks, and some accessibility best practices. Users do NOT have to know HTML in order to edit a web page with Cascade, although it is helpful. Documentation on Cascade use is available online for reference as well.

Allocated Project Time: Zoom meeting, 1–2 hours

ACCESSIBILITY STANDARDS

Emory University websites strive to conform to WCAG 2.0 accessibility standards at the AA level. However, not every accessibility issue can be detected automatically—content editors and web developers should work together to make websites as compliant as possible.

Accessibility Resources:

- [Introduction to Accessibility](#)
- [The Importance of Web Accessibility and How Marketers Can Help](#)
- [3 Reasons Readability Should Matter to Content Editors](#)