# Town of Greenwich Web Document Management  Policy Book

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# HANDLING INSTRUCTIONS

For any questions about this Policy Book, contact Digital Content Editor Cameron Martin in the Information Technology Department: 203-987-1212, cameron.martin@greenwichct.org.

# PURPOSE

The purpose of this book is to provide document standards and best practices for the Town of Greenwich website. Following the processes in this Policy Book will ensure that Town staff provide digital documents in a consistent approach and provide good customer service in the digital presentation of documents.

## General Policy

- **The website should not be viewed by Town of Greenwich employees as the repository of record or an official data archive**. However, allowing residents to access certain documents and information without the assistance of a Town of Greenwich employee is a key benefit to our Town website.
- Departments are responsible for managing documents internally in accordance with the retention schedules adopted by the State Public Records Administrator and Town policy. There is no legal requirement to post any content to the Town website –with the exception of notices of Special Meetings, which must be posted at least 24 hours prior to the meeting.
- All website content must be ADA-compliant, including alternative text for all photographs. PDFs must be searchable by text and should not be uploaded as images to the website.
- The PDF file name becomes part of the web address "URL," so for search engine optimization (SEO) the file name should also complement the document title.
- In Document Properties, the author must be "Town of Greenwich."

# ROLES AND RESPONSIBILITIES

| Role | Responsibilities |
|---|---|
| Department Head | • Instructing their employees as to appropriate presentation of all online documents.<br>• Ensure that Website Content Stewards have Adobe Acrobat Pro to make all PDFs text-readable. |
| Website Content Steward | • Creating content and making updates to assigned sections of the website, e.g., modules for Agenda & Minutes, Calendar, News Flash, FAQs and Forms.<br>• Maintaining sections that are up to accurate, relevant and engaging.<br>• Maintaining the housing, organization and naming of all online documents.<br>• Understanding the policies and procedures in the Town of Greenwich Web Document Management Policy Book. |
| Digital Content Editor (Cameron Martin) | • Enforcing the policies and procedures in the Town of Greenwich Web Document Management Policy Book.<br>• Educating and training new web content stewards about their expected roles and responsibilities.<br>• Educating stewards on self-assessments. |

# HOW TO USE THE POLICY BOOK

For your reference only, below is the link to state minimum requirements for document retention listed by the Connecticut State Library's General Records Retention Schedules for Municipalities:

**https://ctstatelibrary.org/publicrecords/general-schedules-municipal/**

There is no legal requirement to post anything to the website except notice of a special meeting, which must be posted at least 24 hours prior to the meeting. The purpose of posting to the website is to increase access and transparency, which is for customer service and not a legal requirement.

Within this Policy Book, there are general guidelines in regard to 9 common documents. The document types contain all or most of the following categories:

- Naming Convention
- Best Practices – Web Posting
- Best Practices – Web Retention

This Policy Book will change as the State and Town update document management practices for the web in the future. Please refer to this Policy Book regularly when adding documents to the Town of Greenwich website.

# AGENDAS

| Meeting Agendas | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day Selectmen_Agenda_2018_01_25<br><br>In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Posting | Place the agenda in the Agenda Center. A PowerPoint presentation has been created to clearly explain this process and is linked on the Information Technology webpage, www.greenwichct.gov/1124/Information-Technology. When posting a new agenda, authorize the system to send alerts to subscribers. Do not send more than 2 alerts per day. |
| **\* Special Meeting – Legal Requirement \*** | **In the event of a special meeting, the agenda must be posted to the website at least 24 hours before the meeting.** |
| Standard Practices – Web Retention | Once the documents are posted, the website automatically displays the three most recent years, plus "view more" for preceding years. No additional action is necessary by web content stewards for the display or retention of documents on the website. |

# BUDGET DOCUMENTS

| Budget Documents | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day Budget_2018_01_25<br><br>In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Posting | Link the documents in the Document Center module to the appropriate page of the website. |
| Best Practices – Web Retention | The adopted budget should remain on the website for 10 years.<br><br>Preparation Documents and Reports should remain on the website for 5 years. |

# COMPLAINT FORMS

| Complaints From Residents via a Web Form | |
|---|---|
| Storage Process | Form submissions will be maintained in the CivicPlus Form Center. Forms can be exported to another database for further analysis. |
| Best Practices – Web Posting | Review the complaint form quarterly to ensure that the fields are up to date and being sent to all proper recipients. |
| Best Practices – Web Retention | Complaint forms filled out online are stored in the Form Center database. |

# MAPS

| Maps | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day Wetlands_2018_01_25<br><br>In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Posting | Place the map in the Document Center under the proper department – e.g., Geographic Information Systems; Land Use; Inland Wetlands and Watercourses Agency – and link it on the desired webpage. |
| Best Practices – Web Retention | Maps are to be made available to the public on the website as needed. |

# MINUTES

| Meeting Minutes | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day<br>Board _of_Selectmen_Minutes_2018_01_25<br><br>In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Posting | Place the final minutes in the Agenda Center. A PowerPoint presentation has been created to clearly explain this process and is linked on the Information Technology webpage, www.greenwichct.gov/1124/Information-Technology |
| Standard Practices – Web Retention | Once the documents are posted, the website automatically displays the three most recent years, plus "view more" for preceding years. No additional action is necessary by web content stewards for the display or retention of minutes on the website. |

# POLICY AND PROCEDURES DOCUMENTS

| Policies and Procedures Documents | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day Email_Policy_Guide_2018_01_25<br><br>In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Posting | Place these items in the Document Center module and link to the desired area of the website. |
| Best Practices – Web Retention | The most current iterations of each item must be maintained on the desired area of the website. |

# PRESS RELEASES

| Press Releases | |
|---|---|
| Best Practices – Web Posting | When posting to the web, press releases must be placed in the News Flash module under the correct category. They should **not** merely be linked to as PDFs in the Document Center.<br><br>The headline of the item in the News Flash module should be concrete and not abstract in its description. Refer to the Town of Greenwich stylebook – available on the Information Technology page, www.greenwichct.gov/1124/Information-Technology – for further instructions on the best use of headlines. |
| Best Practices – Web Retention | When creating a press release, set the appropriate "Starting On" and "Stopping On" date. |

# Schedules for Public Meetings

| Meeting Schedules | |
|---|---|
| Best Practices – Web Posting | At the beginning of the year, place the schedule in a Meetings folder in the Document Center under a new year. Post a link to the document on the desired webpage for the year in which the meetings are scheduled to take place.<br><br>Place all the meetings on the appropriate calendar through the Calendar module. If any changes are made to a department calendar event that has been copied to the Main Calendar, **both calendars must be updated.** The posted meeting schedule should reflect any changes. |
| Best Practices – Web Retention | Meeting schedules should be viewable on the website for the entire year. |

# REPORTS

| Reports | |
|---|---|
| Naming and Author Convention | This document will use the following naming convention: Alpha_Name_Year_Month_Day Resident_Survey_2018_01_25 <br><br> In Document Properties, the author must be "Town of Greenwich." |
| Best Practices – Web Retention | Reports must be stored in the Document Center. |

**ADDITIONAL RESOURCES:**

1. Human Resources Policy Manual

2. Town of Greenwich Website Style Guide