

CIVICPLUS

Content Best Practices

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Introduction

Purpose

The CivicPlus Internal Best Practices Guide is a checklist for implementing accessibility principles within our CivicEngage content management systems to achieve Web Content Accessibility Guidelines (WCAG) conformance and optimize content usability. Content Editors apply the guide to client content during Content Migration.

Compliance

Americans with Disabilities Act (ADA)

The Americans with Disabilities Act (ADA) is a civil rights legislation that was created to ensure people with disabilities have equal access to commercial, state and local government facilities; it does not define technical standards for web accessibility. Website based ADA lawsuits, complaints, and Department of Justice settlements reference WCAG 2.0 Level A and AA compliance.

Section 508

<u>Section 508</u> requires electronic and information technology of Federal agencies is accessible to people with disabilities. To be compliant with Section 508 electronic content must conform to WCAG 2.0 Level A and AA.

Web Content Accessibility Guidelines (WCAG)

The Web Content Accessibility Guidelines (WCAG) were developed to make content accessible to people with disabilities and users in general. WCAG accounts for accessibility on various devices and considers many different disabilities. Three levels of conformance are used in WCAG:

- A ensures users can access web content
- AA ensures users can easily access web content
- AAA ensures easy access to web content for specific users (not applicable to all content) WCAG is based on four principles of web accessibility: accessible content must be perceivable, operable, understandable, and robust.

Sources

This guide was created using the <u>Web Content Accessibility Guidelines (WCAG) 2.1</u>. Supplementary information interpreting WCAG was derived from <u>WebAIM</u>. Additional resources to aid with implementation include the <u>CivicPlus Help Center</u>.

Compliance

Guidelines to ensure adherence to WCAG standards.

Images

Alt Text	<u>WCAG 1.1.1</u>
All Images	Non-text
All images have succinct, accurate, and equivalent <u>alt text</u>	<u>Content</u>
 Alt text presents content and function of image Alt text is not redundant or use phrases such as "image 	(Level A)
of' or "graphic of"	
 Functional Images (interactive map, graphic button, link) Functional images are used to initiate actions rather than to convey information. Alt text should convey the action being initiated rather than a description of the image. The image is an image map with each room an interactive map area. The alt text is "The building's floor plan. Select a room for more information about the purpose or content of the room." The instruction to "select a room" indicates that the image is interactive. Images linked to documents include document extension in alt text Screen readers will indicate links. As such, linked images only need to indicate where the user is being taken. (ie: City of Manhattan homepage) 	WCAG 1.4.5
City of Maintattan nomepage)	Images of Text
 Complex Images (chart, graph, map, text) Alt text describes information in image, or Text displayed in image is used as alt text (100 character limit), or Accessible format of the information is provided (ie: link to accessible document or text on the page) Alt text should describe general content of image and function of link), or 	(Level AA)
Animations	<u>WCAG 2.2.2</u>
Do not place animated images on the page	Pause, Stop, Hide
	(Level A)
Decorative Images (stock photos, clip art)	WCAG 1.1.1
Decorative images are not to be migrated.	Non-text Content
	(Level A)

	WCAG 2.2.2
THIS OF EACH CALL AND A STREET OF A STREET	Pause, Stop, Hide
are not used in slideshows	(Level AA)

Text

Abbre	viations and Acronyms	WCAG 3.1.4	
Write out on first reference followed by acronym in		<u>Abbreviations</u>	
	parentheses (example: "Accounting and Auditing Policy		
	(AAP)") Exceptions:		
	o Acronyms that are now words themselves (ie:		
	SCUBA, HIV)		
	 State names in addresses 		
	o Accreditations or certifications as part of titles or		
	for personnel		
	o Acronyms in document titles		
Typog	graphic Symbols	<u>WCAG 1.3.1</u>	
•	The meaning of a symbol should be identified via text for	Info and	
	symbols that are essential to your message. Examples:	<u>Relationships</u>	
	o "All required fields are marked with an asterisk	(Level A)	
	(*)".	(11)	
	o "Connect with us on Twitter using the following		
	hashtag (#) reference: #socialmedia"		
•	Roman numerals used as part of legal text should be left		
as is.			
Punct	uation	<u>WCAG 4.1</u>	
		<u>Compatible</u>	
	and indicate how it should be read. Punctuation should		
	not be used as a substitute for a word.		
	○ (ie: Hours are 8 am – 9 pm This should instead		
	be Hours are 8 am to 9 pm)		
	o A dash can be used to mark a break in a sentence.		
Font		<u>1.4.8 Visual</u>	
Underline text is used only for hyperlinks		<u>Presentation</u>	
All caps can be used for acronyms, not for emphasis (use		(Level AAA)	
bold)		,	
Do not use italics (use bold for emphasis)			
Do not bold entire sentences or blocks of text			
Do not fully justify text (align to both left and right			
margin)			
Do not center align text			
	o Single lines of text can be centered (ie: a		
	title/heading) but should be used sparingly.		

Jargon, Slang, and Unusual words Note to the client to provide method or phrases	for defining words WCAG 3.1.3 Unusual Words (Level AAA)
<u> </u>	,
 Language Label text other than English in editor HTML attribute 	Page
	(Level A)
Link text	<u>WCAG 2.4.4</u>
 The purpose of each link can be determined link text alone (or from the link text surrounding text, list item, table cell, Ensure that you are not using describe different links (ie: Donline" on the same page for go to different locations.) Links (including emails) are masked of modules. 	and its context e.g., or table headers). g the same text to o not use "view multiple links that
Quotes	WCAG 1.3.1
Label quotes using HTML attribute	
Sensory Characteristics	WCAG 1.3.3
Instructions do not rely upon shape, location (example: "Click the square "Instructions are in the right-hand co	size, or visual Sensory icon to continue" or Characteristics
Subheads	WCAG 2.4.10
 Subheads are informative, describe pare intuitively named, and help break page content Subhead 1, 2, 3, bold are used in hier Subhead 2 is only used under subheat information related to subhead 1 top 3 and bold) Avoid duplicate headings on the same "read more") Unrelated topics are housed on separations. 	aragraph content, -up and organize archical order d 1 to separate ic (same for subhead e page (example:
Tables	WCAG 1.3.1
 Information type Use tables to organize sets of repinformation Do not use tables for formatting 	etitive and related Info and Relationships (Level A)

•	Header titles accurately describe information in
	related cells

• Do not use images, colors, or standalone symbols in cells to relay information

W3C Tables Concepts

Display

- All columns have intuitively named headings
- Header rows and/or columns are properly distinguished from other rows
- Tables have alternate rows color setting
- Cells are not left blank

Formatting

- Information is listed in logical order (example: alphabetized, numerical, rank, etc.)
- Dollar amounts or number decimals are all formatted the same way to make information scannable

In-House Formatting Consistency

Guidelines to ensure consistency across website.

Images

Formatting

- Limit of 10 images in slideshow (larger amounts of photos should go in Photo Gallery and should be linked on page)
- Wrap text around images to remove excess white space
- Ensure image placement does not impede scannability of page content
- Remove background styles for images placed on the page using the image widget

Logos

- Add all logos to Image Repository and place on the page
- Alt text includes image text, but does not include the word "logo"

Mobile Responsive

Images in the editor widget have width attributes set as a percentage

Pages

Linked Pages

Linked pages link directly to source page, not to a linked page

- Page titles reflect intended use of page (example: HDI page titles)
- Linked pages do not have subpages
- Linked pages that link to files have the file extension in parentheses in page title

Page Description

• All pages must have a complete sentence page description that describes the content on the page and includes proper punctuation

Page Titles

- Page titles are descriptive, informative, and describe main topic found on page
- Page title and menu title are the same
- Use a space on either side of / (slash) to prevent breaking in left-hand navigation and mega menus (example: "Parks / Recreation Department")

Pages Widget

- Use Format 2 Depth 1 to display links and page descriptions
- Use Format 3 Depth 1 for pages with repetitive page descriptions
- Use Format 3 Depth 2 for bucketed global pages such as How Do I
- Use Format 4 Depth 1 if the client has provided images or icons for subpages

Text

Boards and Commissions

Template

- Format according to Boards and Commissions Templates and be consistent as possible between boards
- If client does not have all information indicated in template, do not include placeholders for that information.
 - o Leave client note to provide missing information
- List members in bulleted list by rank/ward/district first and then alphabetize any remaining members by last name, a table can be used for extensive information
- Biographical information should be housed on hidden subpages

Boards and Commissions Main Governing Bodies

- Main board examples include Board of Commissioners, City Council
- Enter contact information into Staff Directory

Boards and Commissions Non-Governing Bodies

- Non-governing bodies examples include Planning Board, Library Board
- Place contact information in bulleted list using contact information block
- Do not add contact information to Staff Directory

Bulleted Lists

- Bullet listed items
 - o Editors will use discretion on when this should be applicable
- Lists are introduced by page title, subhead, sentence, or sentence fragment with colon
- Clean up leftover punctuation when sentence is broken into a list (commas, semicolons, and periods).

List Organization

- Alphabetize lists of nouns
- Alphabetize lists of names by last name or rank
- Order by topic when introducing more information
- Order chronologically if list of dates
- Sentences and fragments do not need to be organized

Contact Information

Address

- Spell out all street modifiers (street, avenue, etc.)
- Abbreviate all compass points without periods (N, S, NE, NW, etc.)
- Secondary address information on second line (apartment, P.O. box, room name, suite, unit, etc.)

Phone / Fax Numbers

- xxx-xxx-xxxx, ext. xxx (always include area code)
- xxx (for 3 digit numbers such as 911 or 411)
- Phone and fax numbers must be labeled
- Phone numbers in text (not address blocks) should be introduced with a sentence

Time

- Minutes should not be displayed for full hours. For example, you would display: 8 am 4:30 pm
- Use noon and midnight in place of 12 am and 12 pm

Contact Information Address Block

- Use address block when full address is listed within page content
- Do not add an extra line break above an address block
- Leave a line break between the bottom of the address block and any following content
- Address blocks should not be bulleted or indented unless they are part of a bulleted list
- Example Address Block

Patti Plus

Title

Department

Street Address

Suite / Floor / Room / Secondary Information

City, ST Zip

Phone: xxx-xxx-xxxx, ext. xxx

Fax: xxx-xxx-xxxx Email Patti Plus

Hours [bold]

Monday through Friday 8 am to 5 pm

Dates

- Do not abbreviate months (example: correct "December" incorrect "Dec")
- Use Month Day, Year format for dates in paragraph text (example: "December 31, 2020")

Documents

- Upload documents and images in file format found on client site; do not convert documents to PDFs
- For document naming conventions, see respective module

Links

- Internal links should use relative URL.
- Broken links are not brought over to the production site; note to the client if broken links are found
- Add links to other departments, offices, modules, or resources mentioned in client content when they are required for next steps; if not able to locate link, leave a client note

Documents

- Links to internal or external documents open in new window
- Links to documents have a file extension (example: "Water Report (PDF)")

Email

- Mask email address and include the work email and the person/department name in link text (example: "email Patti Plus")
- Use mailto: for email links (example: Email Water Department)

Websites

Links to internal or external websites open in same window

Numbers

- Use a comma after every 3rd digit (example: 123,456)
- Include zero before decimals (example: 0.13)
- Fractions should be written out as numerals separated by a forward slash (example: 1/3)
- Remove instances of written out numbers with numerals (example: correct "7" incorrect "seven (7)")

Symbols

Ampersands &

• Use the ampersand (&) in category titles, page titles, subheads, and table header rows

• Write out "and" in all paragraph text unless it is an official company name (example: AT&T)

Asterisk *

- Asterisks should only be used when necessary (ie: Form Center). When all possible, an asterisk is being used to indicate a footnote, reformat the information so the asterisk is not the only way the footnote is communicated, or leave a client note
 - o Note page 6 for when using an asterisk

At @

• The @ symbol is read out by screen readers but should be written out in text for consistency

Math

• Use HTML for math symbols. Refer to <u>Toptal Designers Math Symbols</u> or <u>W3Schools Math Symbols</u>.

Symbols that can be used in text are listed in the following table. All other symbols must be written out.

Symbol	Description	HTML
&	and	&
£	British pound	£
•	bullet	% #8226;
©	copyright	&сору;
0	degree	°
\$	dollar	\$
€	euro	% #8364;
9	paragraph	¶
%	percent	%
®	registered	®
/	slash	/
TM	trademark	™
¥	yen	¥

Navigation

Bucket pages

Pages are bucketed into intuitive categories to increase usability

Navigation

• Main Governing Board is housed in 2nd tier of the Government (or similar) mega menu and linked to as necessary under departments or other related pages

Site Map

- Pages are alphabetized on site and navigation spreadsheet
- Navigation spreadsheet matches site map

Titles

Category Titles

- Intuitively named
- Use title case and the ampersand symbol "&" in all category and field titles
- Larger sites with multiple categories can consistently use 2-level categories (example: "Main Topic Sub Topic" "Police Safety Tips")

Mobile Responsive

• Images in the editor widget have width attributes set as a percentage

Modules & Related Widget Use

Agenda Center

- House all agendas and minutes in Agenda Center (or follow client specification)
- Agendas should not show as amended
- Documents do not have to be renamed

Simple Agendas - Single PDF Agendas

 Description: "Board Name" "Meeting Type" "Document" "-Meeting Status" (PDF)

Complex Agendas - Agendas made of items

- Description: "Board Name" "Meeting Type" "Document" "-Meeting Status"
- Agenda should be first item, followed by meeting materials
- Agenda uploaded to item named "Agenda"
- Other documents uploaded to item named "Meeting Materials"

HTML Agendas - Agendas made of text linked to documents

- Description: "Board Name" "Meeting Type" "Document" "-Meeting Status"
- Document should be uploaded into the Document Center using folder structure: Board Name Meeting Documents > Year > Month
- Create item named "Agenda" paste text from agenda into the description, create links in text to documents in housed in Document Center

Archive Center

- House reoccurring dated documents (example: budgets, newsletters, press releases etc.)
- Document titles should be consistent within categories and include date (example: "October 2014 Monthly Report (PDF)")
- Order items by date

- Add file extensions to all documents
- Use Month Day, Year format for dates document titles (example: "December 31, 2020")

Document Center

- Use intuitive folder and document names
- Add file extension to all documents
- If a large number of documents (approximately 100 or more) has a uniform naming convention that does not impede accessibility (the name conforms to the Compliance Text section of the Best Practices), retain the client's naming convention
- Date formatting is not required except in specific client instances (ie: Agendas in the Document Center) necessitate this. When dates are required, the following formatting should be followed:
 - MM-DD-YYYY for dates in document titles (example: "12-31-2020 Meeting Information (PDF)") so documents will display chronologically in Document Center or Related Documents widget
 - Note the date must be at the beginning of the document name

Facilities

- Do not enter 3rd party facilities; they should be added to resource directory
- Entries must have address or cross street to be added to Facilities module, if no address is provided leave a note for the client to populate
- Add "Phone:" before phone number in Contact Phone Number field
- Mask email addresses: "Email Jane Doe"

Facilities Images

- If adding link to video, deselect open in new window
- Images should be at least 640 by 640 pixels to be used in the module, if images are smaller than this size they can still be uploaded; note to the client to add larger images
- If only one photos is uploaded, pagination and next arrows should not be turned on in slideshow
- Complex images can be used in slideshow if they link to a larger version

FAQs

- Question and answer formatted content that is housed on a page (do not convert FAQs from documents unless specified by specialist) is added to the FAQ module
- Include "next step" information

Form Center

- Do not use HTML within the form center. Content should be recreated as best as possible with the innate functionality of the Form Center.
 - Links and emails should be carried over but not masked.
 Descriptive text for links and emails indicating purpose/function of the link is required.

- Do not use place holder text in short or long answer boxes
- Use uniform font text and colors
- Use title case and appropriate punctuation in field labels, instructions, and options
- Print Only forms must include a submission address on the form
- Online form submission options match any submission instructions mentioned in client form; note to client to change information if needed
- All links within the form should open in a new window to ensure information added to the form is not lost
- All links to forms created within the form center should open in the same window (considered pages, not documents)
- Do not create forms that require any of the following (leave note for client):
 - Bank account information
 - Birth certificate copy
 - Business ID numbers
 - Date of birth
 - Driver's license numbers
 - Medical information
 - Passport numbers
 - Passwords
 - Routing numbers
 - Social Security numbers
 - Tax ID numbers
 - W2 or other tax documentation or information
- Alphabetize lists and drop-downs.
 - Options such as "Other" or "None of the Above" should be used at the end of the list as they indicate alternative choices from the set of options.

Info Advanced

Module

- Use Info Advanced for 3rd party contact information only
- Format should mimic Staff Directory formatting

Widget

 The Info Advanced widget is placed at the top of the Feature Column when used for contact information

Photo Gallery

- Leave a client note if not able to provide specific information about photos for alt text
- All images should have titles and alt text; caption text can be populated based on client content
- Links should be created to Photo Galleries whenever possible
- Photo Gallery naming convention of adding numerical numbers is acceptable for large event albums
 - o Ie: "Fourth of July Parade 1" is acceptable for large event albums.

Quick Links

- Category titles should be intuitively named based on content of links
- Use file extension for links to documents
- Documents should open in new window

Resource Directory

- If no address is listed, remove the city, state, and zip code information
- Select yes to link to map for all entries with an address
- Link: select open in same window
- Select at least one category that reflects the content of the entry

Staff Directory

Module

- All listings in alphabetical order
- Images should be 200 pixels wide or smaller
- Alt text for images of staff is staff member's full name
- Add all contact information for departments, offices, employees, etc.
- 3rd party employees or departments should be housed in Info Advanced
- Non-governing boards members should not be added to Staff Directory
- See Contact information section for how to format address.

Category

- Delete city, state, and zip code information if no address
- Map & Directions: select "Display a map and links for directions for the physical address"
- If contact form is used, mask as: Contact First Name Last Name
- Show email as: Email department name
- Link: use relative department page link
- Link text: Department Name Page
- Brief Description: department or office hours or any additional information that cannot be placed in other category (example: additional phone numbers, fax numbers, after hours numbers, etc.)
- Hours formatting

Hours (Subhead 2)

Day through Day

Time am to Time pm

Item

- Must include first and last name
- Show email as: Email First Name Last Name
 - If contact form is used, mask as: Contact First Name Last Name
- Biography: for biographical information, additional contact information, etc. normal text formatting applies

Widget

- Should always be at the top of the Feature Column
- Staff
 - Never select "Biography" for staff members

- Do not select "Link to staff in Staff Directory" unless there is information in the Biography text box in the module
- Display staff information above department information
- Display phone number or email if present in the module.
- Departments
 - Select "Description" if there is information in the Brief Description text box in the module
 - Never use the "All Employees" option
 - Display a link to the Staff Directory when department information is displayed
 - Show email as: Email Department Name
 - If contact form is used, mask as: Contact Department Name
 - Display link to Directions when address is present

Editing

Guidelines to ensure grammar accuracy across website.

Capitalization

- Title case for
 - Category titles
 - Document titles
 - Page titles
 - Subheads
 - Website names
- Capitalize first word of each sentence, bullet, and item within table
- Use client capitalization for job titles, departments, offices, local regions, proper nouns, etc.

Punctuation

• Periods at end of all complete sentences

Spacing

- Spacing should be consistent on pages and in modules
- There should not be extra spaces between subheads and text
- Slashes / and dashes should not have a space on either side, except in page titles
- Use the dash -, not the em or en dash

Grammar, Typos & Other Errors

- Standard grammar guidelines should be followed unless stated otherwise in the Best Practices.
- Replace missing content or leave client a note. Placeholders should not be utilized.
 - O Do not create blank pages. Leave client a note if a page is blank on the existing site as to why it was not recreated on CivicEngage site.
 - o If feature column is turned on, it should be populated with content. If no content is utilized, ensure the feature column is turned off.
- Ensure proper content is related to page (ie: correct staff directory department is featured)
- Remove double-pasted content, typos, and other editing mistakes.