

PAS 124:2008

Defining, implementing and managing website standards

A statement of best practice



MAGUS™

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Foreword

This Publicly Available Specification (PAS) has been developed by Magus in collaboration with The British Standards Institution (BSI). Acknowledgement is given to the following organizations that were consulted in the development of this specification:

- Institute of Directors
- The Institution of Engineering and Technology
- Interbrand
- Localization Industry Standards Association (LISA)
- SDL PLC
- Shell International B.V.
- Unilever PLC

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Introduction

Website standards are the library of standards specified by an organization to govern the content, function, and appearance of their website or group of websites (see Table 1). Managed effectively, they deliver tangible performance and operational benefits. However, defining, implementing and managing website standards presents organizations with common logistical challenges. Many organizations are also unaware of the extent to which they should be defining website standards, and the benefits they deliver (see Table 2 on page iv).

This Publicly Available Specification (PAS) sets out a best practice approach to defining, implementing and managing website standards. It provides a framework to help organizations deploy website standards efficiently and harness their full potential.

This PAS has five main parts:

- **Defining website standards (Clause 3):** Setting scope, gathering information and requirements, specifying and documenting standards;
- **Implementing website standards (Clause 4):** Deploying and communicating standards;
- **Managing website standards (Clause 5):** Supporting editors, process and governance, monitoring, measurement and review;
- **Annex A:** Guide to the key categories of website standards;
- **Annex B:** Useful sources of information.

About website standards

Table 1 shows the key categories of website standards, as defined for the purposes of this specification. They include both organizationally defined standards (e.g. brand and editorial standards), and standards specified by external agencies, such as governments and official standards bodies (e.g. legal and accessibility standards).

Further information about each type of standard is provided in **Annex A**.

Table 1 – Key categories of website standards

Type of standard	Annex
Brand and visual	A.2
Editorial	A.3
Information architecture and navigation	A.4
Naming and metadata	A.5
Search engine optimization	A.6
Usability	A.7
Accessibility	A.8
Legal	A.9
Rich media and PDF	A.10
Code	A.11
Performance	A.12

Why do organizations need website standards?

Website standards are powerful tools for managing the process of website creation and publication within an organization.

The main purposes of website standards are to:

- Guide web developers and content creators in the development and maintenance of websites;
- Optimize and control the user experience of website visitors;
- Help organizations to successfully utilize their websites to support their online goals.

The key benefits of website standards are summarized in Table 2.

Current trends

As the web matures as a business and communication platform, issues of standards and compliance are becoming increasingly important. However, the requirement for a best practice approach to defining, implementing and managing website standards is also being driven by other operational and economic trends, including:

- Globalization, and the move from local to centralized governance of online communications;
- Increased use of Content Management Systems. Growing organizational website spend is making the economies of a common platform and standards framework increasingly compelling;
- The move towards devolved models of publication. Content Management Systems enable organizations to maintain their websites directly, using in-house content specialists, rather than outsourcing to external web specialists. This creates a need for internal process and governance to communicate standards and support compliance.



Table 2 – Key benefits of website standards

Brand
• Reinforcement of the brand by ensuring consistency of brand presentation and messaging; • Protection of brand and company reputation by ensuring a consistent, high quality user experience.
Risk
• Minimization of online risk through compliance with legislative requirements; • Securement of appropriate protection of intellectual property under a defined legal jurisdiction.
Financial
• Protection of investment in web-related projects by ensuring quality and performance is maintained on an ongoing basis; • Reduction of development and maintenance costs; • Provision of access to the widest possible market, by ensuring compliance with accessibility guidelines and compatibility with target user platforms; • Optimization for targeted customer acquisition due to the effective localization of content.
Workflow
• Reduction of time to market, through streamlined development and maintenance processes; • Communication and enforcement of best practice across web teams, and the organization as a whole.
Performance measurement
• Provision of objective targets against which performance can be tracked and measured.

1 Scope

This Publicly Available Specification (PAS) provides guidance for best practice in defining, implementing and managing website standards in companies and organizations. This PAS is aimed at public and private organizations with public websites, intranets or extranets, specifically:

- Organizations considering, planning, or in the process of developing website standards;
- Organizations with existing website standards wishing to align themselves with best practice methodologies.

This PAS can be used by anyone who manages, or has responsibility for, a website or a multi-site web presence. This could include:

- Global/corporate communications teams;
- Marketing teams;
- Brand guardians;
- Website managers;
- External agencies responsible for defining and/or managing web and brand guidelines;
- IT managers, especially those involved in setting up a Content Management System (CMS) framework;
- Legal/Compliance/IT risk teams.

This PAS outlines a best practice approach to website standards throughout the website life cycle, starting with the initial planning and definition stage. However, it is important to note that website standards are never static. They continually evolve to meet changing internal and external requirements, and can be usefully addressed at any point in the website life cycle.

This statement of best practice is intended to be independent of the underlying platforms and technologies used in the creation of websites. Specifically, it does not include guidance on technology selection, infrastructure standards (e.g. connectivity, security and availability), or website and multi-media development practices.

Where related standards and specifications exist, these are referenced rather than reproduced within this document.

NOTE See Annex B for a list of related standards and resources.

2 Terms and definitions

For the purposes of this PAS the following terms and definitions apply.

2.1 accessibility

the practice of making websites usable by people of all abilities and disabilities

NOTE 1 An “accessible” website is one that is deemed to facilitate equal access to information and functionality to all users, regardless of disability or the web browser and platform they are using.

NOTE 2 At the time of writing, the Web Content Accessibility Guidelines (WCAG) [1], are widely accepted as providing the international benchmark standard for accessibility compliance.

NOTE 3 Accessibility also benefits people without disabilities. The aims of accessibility design overlap with those of other standards areas such as usability, web standards compliance and search engine optimization, which are of benefit to all users.

2.2 assistive technology

hardware or software used to adapt or make computer systems and services accessible to a disabled person

NOTE 1 Examples include the provision of screenreaders and text-to-speech systems; screen-magnification software; tactile braille display, trackballs, touch pads/screens etc; alternatives to standard computer mice, keyboards, switches and voice-recognition software.

NOTE 2 Also referred to as access technology, adaptive technology.

[Source: PAS 78: 2006]

2.3 automated compliance testing tools

software applications used, without direct human intervention, to assess whether a website is standards-compliant

2.4 Cascading Style Sheets (CSS)

mechanism for adding style, layout and presentation (e.g. fonts, colours, spacing, positioning) to web documents

NOTE CSS enables the separation of content from presentation.

2.5 Content Management System (CMS)

software application which provides facilities to create, manage, store and publish web content

NOTE There are many varieties of CMS designed to manage different content types. For the purposes of this document, the term CMS is primarily used to refer to Web Content

Management Systems – a type of CMS which is concerned with the management and publication of web content. However, the boundaries between different types of CMS are blurred, and other types of CMS include web content management as part of their wider service offering. The term can therefore be understood to include other types of CMS (e.g. Enterprise Content Management systems) that provide integrated web content management functionality.

2.6 contributor

any person who contributes to the content, code or design of a website on behalf of the organization

2.7 common platform

centrally provided CMS that is shared across an organization, along with the associated web services and technical platform (see 2.9)

2.8 disability

physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities

NOTE *Disabilities that affect access to the web include: visual, auditory, physical, speech, cognitive and neurological disabilities, temporary disabilities (such as a broken arm) and changing abilities due to aging.*

2.9 diverse platform

dispersed website infrastructure where websites are built and maintained at a local level, without access to a common CMS (see 2.5 and 2.7)

2.10 domain name

name that identifies an organization, website or other entity on the internet

NOTE *It usually consists of segments separated by full stops. A domain name appears as a component of a website's URL (see 2.22). For example: com, ourcompany.com and www.ourcompany.com are all domain names in the URL: www.ourcompany.com/folder/filename.html.*

2.11 editor

any person who contributes to, or makes editorial changes to, the content of a website on behalf of the organization

2.12 Flash®

rich media programming format that enables developers and designers to add animation and interactivity to web and mobile applications

NOTE *Flash is a registered trademark of Adobe Systems Incorporated in the United States and other countries.*

2.13 heuristics

guidelines or rules that are used to guide the process of evaluation

[Source: PAS 78: 2006]

2.14 information architecture

the organization, labelling, and navigation schemes which make up the information system of a website

2.15 localization

the adaptation of a website to make it appropriate to the target locale (country/region and language)

2.16 Portable Document Format (PDF)

file format for the distribution of content that retains the formatting and layout it was given at its creation and can be viewed on different computers and platforms via a specialized reader or via a browser plug-in

NOTE *PDF is a proprietary but published specification. Documentation about PDF and accessibility can be found at <http://www.adobe.com/accessibility>.*

[Source: PAS 78: 2006]

2.17 RACI diagram

used to describe the roles and responsibilities of the various stakeholders taking part in a project

NOTE *A RACI diagram splits project tasks into four types of responsibility which are then mapped to different roles in the project. These responsibility types are: Responsible, Accountable, Consulted and Informed. Together they make up the acronym RACI.*

2.18 rich media

media that consists of any combination of graphics, audio, video and animation

2.19 search engine optimization (SEO)

the process of planning, implementing and maintaining a website's information architecture, content and underlying technology so that its pages rank higher in relevant search engine results

2.20 stakeholder

any person who has an interest in a website, or contributes to its specification

NOTE *Includes internal and external users and contributors.*

2.21 template

pre-specified layout to which editors may add content in controlled ways, to produce a completed page matching organizational design standards

NOTE Typically this will consist of sections of code that are “locked”, and others into which content can be added.

2.22 URL (Uniform or Universal Resource Locator)

address of a file, page or other resource on the internet, combined with information about how to access it. A URL must contain both a domain name (see 2.10) and a protocol (see note below), for example: `http://www.ourcompany.com/folder/filename.html`. If the resource is a specific file, the URL also includes its path: `“/folder/filename.html”` in this example.

NOTE A protocol is a method of exchanging data on the internet. In a URL the protocol “http://”, for example, indicates that the file should be accessed as a web page, whereas “ftp://” indicates that it should be obtained by file transfer.

2.23 usability

extent to which a website can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use

[Source: PAS 78: 2006]

2.24 user

the end user of a website

2.25 user agent

software (including web browsers and plug-ins) that retrieves and renders internet content or services, including text, graphics, sounds, video

NOTE 1 Examples include media players (including Adobe Flash Player for Flash content) and other software that renders web content (including Adobe Acrobat Reader for PDF content).

NOTE 2 Assistive technology might sometimes be considered a user agent.

[Source: PAS 78: 2006]

2.26 W3C

see World Wide Web Consortium (2.31)

2.27 W3C/WAI guidelines

accessibility guidelines (ATAG, WCAG and UAAG) published by the W3C WAI (see 2.28)

[Source: PAS 78: 2006]

2.28 Web Accessibility Initiative (W3C WAI)

body of the W3C that, in coordination with organizations around the world, pursues accessibility of the web through five primary areas of work:

- Technology;
- Guidelines;
- Tools;
- Education and outreach;
- Research and development.

[Source: PAS 78: 2006]

2.29 Web Content Accessibility Guidelines (WCAG)

Web Content Accessibility Guidelines published by the W3C WAI (see 2.28)

NOTE The version of WCAG in use at the time of publication is 1.0.

2.30 website standards

umbrella term referring to the range of standards defined by an organization to govern the content, function and appearance of a website

NOTE 1 The term encompasses: brand and visual standards, editorial standards, information architecture and navigation standards, naming and metadata standards, search engine optimization standards, usability standards, accessibility standards, legal standards, rich media and PDF standards, code standards and performance standards.

NOTE 2 The term “website standards” is differentiated in the context of this document from the term “web standards”. The term “web standards” is commonly understood to refer to code standards, established by the W3C (see 2.31) and other standards bodies, for the creation and interpretation of web-based content.

2.31 World Wide Web Consortium (W3C)

international consortium of organizations that develops interoperable technologies (specifications, guidelines, software and tools) to lead the web to its full potential

3 Defining website standards

3.1 General

Organizations should define standards to ensure that their websites meet the needs of their visitors and the organization.

The standards should aim to be as comprehensive as possible, and specify how the organization's websites should meet a broad spectrum of criteria, including: brand, legal, behavioural and functional criteria. In parallel, organizations should define the internal processes involved for meeting, managing and maintaining these standards.

3.2 When should website standards be defined?

Website standards are most effectively defined in conjunction with the website design process. The definition process should both inform the design process and be informed by it.

Defining standards in conjunction with, rather than after, the design process delivers several operational benefits:

- Helps to clarify and formalize decisions;
- Facilitates communication and change management;
- Reduces errors and iterations in the design and development process;
- Provides a blueprint against which the finished website can be evaluated.

However, it is important to note that standards definition is an ongoing task. An organization's published standards should be regarded as being in "permanent beta". They should evolve to meet changing internal and external requirements, and should be reviewed and updated on an ongoing basis (see 5.3).

3.3 Definition workflow

Defining website standards in conjunction with a web design process is not usually a linear process. Different processes will feed into each other as illustrated in Figure 1. The stages illustrated in Figure 1 are discussed in clauses 3.4 to 3.10.



Figure 1 – Recommended standards definition workflow

