CERP Guidance Memorandum

South Florida Water Management District – Jacksonville District, U.S. Army Corps Of Engineers

CGM NUMBER-REVISION: 053.00

EFFECTIVE DATE: 07/15/08

CATEGORY: Web Management

SUBJECT: CERP Internal Web Site - Use, Policy and Guidance

Description:

This memorandum provides guidance to both Jacksonville District, U.S. Army Corps of Engineers (USACE) and South Florida Water Management District (SFWMD) staffs and establishes protocols for the management and administration of the CERP Zone Internal website herein referred to as "*CERP Internal Web*". The purpose is to define roles, responsibilities and processes necessary for the successful management of the *CERP Internal Web*. This protocol will change based on evolving programmatic requirements, information, technologies and site usage.

The Design Agreement between the Department of the Army (DA) and SFWMD was signed on 12 May 2000. The CERP Master Program Management Plan, Vol. I – Management Processes Comprehensive Everglades Restoration Plan *2.2.1. 1 Shared Data and Information Network* subsequently specified:

> "A separate network will be established to facilitate electronic document storage and retrieval as well as information management and collaboration for the Comprehensive Plan implementation. This shared data and information network will be equally accessible to both the SFWMD and the Corps. It will consist of a web site and servers that will allow for sharing of draft and final documents, schedules, financial, scientific and geospatial data, and other program-related information between the Corps, SFWMD and other authorized users. The infrastructure and software will be designed to eliminate the potential for security and firewall breaches that could threaten the integrity of the system and the information it contains."

In 2001, the CESAJ IM and SFWMD IT staffs initiated the creation of an internal information website. This website was created to support collaboration and information sharing for the CERP program and project teams. This site was developed to be accessible to all authorized users. The domain name www.cerpzone.org was obtained for this purpose.

This document provides working level guidance to assist Project Delivery Teams in the implementation of the Comprehensive Everglades Restoration Plan (CERP) program executed between the South Florida Water Management District and the U.S. Army Corps of Engineers. The guidance does not constitute policy for either agency nor does it create authority beyond that granted to any agency member carrying out their duties. Guidance reflecting agency policy on subjects listed in the guidance memoranda section of the programmatic regulations for CERP will be issued when the final programmatic regulations are adopted, using the process stated in the regulations.

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Guidance:

The *CERP Internal Web* is defined as the official Intranet site for implementation of the Comprehensive Everglades Restoration Plan (CERP). The *CERP Internal Web* shall serve to promote the concepts, principles and goals of the CERP. The *CERP Internal Web* shall provide a mechanism for sharing information specific to the implementation of CERP. All supporting documents that are used in the business decisions in CERP should be stored in accordance to their retention schedules in the CERPZone. It should be viewed as an opportunity for Program and Project Managers, Study Team Leaders, RECOVER Groups and Teams, and Outreach Specialists to fulfill the requirement to share programmatic, project and study information with project delivery teams (PDT).

All content and applications described or contained on the *CERP Internal Web* shall be directly related to planned or ongoing CERP programmatic or project activities and other closely related Everglades Restoration Projects. The *CERP Internal Web* shall not serve as an advancement opportunity for commercial interests or for any entities not involved in promoting and executing the CERP program.

The roles and responsibilities of Administration and the following functions are described herein.

- Authentication
  Systems and processes to establish or confirm user identity

- Team Rooms
  A segmented, membership based collaboration environment

- Applications
  Web based applications available to authorized users

- Help/Training
  Provides assistance in the form of Frequently Asked Questions, User Documentation, Computer Based Training and links to other web sites and applications

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Roles and Responsibilities for Administration

The responsibility of maintaining the *CERP Internal Web* is shared between the U.S. Army Corps of Engineers (USACE) and the South Florida Water Management District (SFWMD).

Technology Management Board - This board is responsible for the daily technical leadership and management of the site. The board coordinates with the appropriate technical personnel, web oversight, and content management members to enhance and improve existing data management tools and technologies to support the CERP program. The board is composed of both USACE and SFWMD representatives. The designees shall coordinate with the corresponding agencies' Chief Information Officers.

Website Administrator - This role has general technical responsibility for the site and is provided as a single point of technical contact and general knowledge for issues pertaining to the site. The *Website Administrator* coordinates with the *Technology Management Board* and identifies appropriate personnel on the technical team to address specific issues.

Web Designer - This role is a technical resource for content editing and works with the *Content Manager, Application Technical Contacts*, and *Team Room Owners* to create web content with considerations for interaction, aesthetics, and usability. The *Web Designer* performs daily web editing, HTML coding, art design and direction, page layout, image creation and the creation of multimedia documents such as animations, audio and video files.

IDM Web Liaisons - This role incorporates an agency representative from the USACE and the SFWMD, who are responsible for collaboratively determining and approving the business needs of their respective agency for the *CERP Internal Web*.

Infrastructure Liaison - This role is a single point of contact for communications with the infrastructure group. The infrastructure group monitors server integrity and/or status and coordinates with appropriate technical staff to resolve operational issues. The infrastructure is also responsible for backups, server integrity, and server connectivity and communications.

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Application Owner/Team Room Administrator –This role ensures that change requests have been satisfactorily completed. Close coordination between the requestor and the *Web Content Manager* is required to ensure that the presentation is consistent with the requested change(s).

Roles and Responsibilities for Authentication

Sponsor Agencies

- The U. S. Army Corps of Engineers (USACE) is the Sponsor Agency for the participating Federal Agencies.
- The South Florida Water Management District (SFWMD) is the Sponsor Agency for the participating Non-Federal Agencies.

Participating Agency – A governmental or educational entity approved for CERP collaboration.

CERP Access Security Officer (CASO) - Each active participating Agency must appoint a primary and alternate *CASO* by completing the CERP Access Security Officer Appointment Memorandum, signed by the Agency Head. The Primary and Alternate *CASO* must also read, understand, and sign the CERP Access Security Agreement. These two documents may be created online at www.evergladesplan.org. After the *CASO* documents are created and appropriate signatures are obtained, they should be mailed to the appropriate *Sponsor Agency* as noted on the *CASO* instructions.

After the signed Memorandum and Security Agreements are received and entered into the *CASO* system, the agency can proceed to request individual user access using the CERP Access Request System (CARS) forms and instructions found on www.cerpzone.org. The *CASO* will validate the requesting user's need to access the CERPZone network. The *CASO* will notify the appropriate Sponsor Agency of the CARS approval.. The *CASO* will be notified when requested accesses have been granted. Each agency is required to keep and be able to produce all signed CERP Access Request System (CARS) Documents.

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Agency *CASOs* are responsible to notify the Sponsor Agency *CASO* when a CERPZone user leaves the organization, when system access has been suspended or revoked for any reason, and when there is any change to a user's access requirements.

Users - Requesting individual user access to the CERPZONE requires the submission of the CERP Access Request (CAR) form. This required document must be filled out and created online. Then the document is printed, signed and delivered to the address as indicated on the instructions. When requested access has been granted, the user will be notified via e-mail. Users are required to comply with all CERP security policies. Users are required to notify their Agency *CASO* when they leave the organization or do not need access to the CERPZone network any longer. All users are required to keep their access active by following the password update procedures of their Sponsoring Agency.

Sponsor Agency Approver – Validates that the user requires CERPZone access by signing all requests for new User IDs for their respective agency. They also determine the appropriate access requirements for the user. This may be a supervisor or central contact as determined by the agency.

Sponsoring Agency CASO – In addition to their CASO responsibilities, the Sponsoring Agency CASOs will perform the following functions. Accept and support participating agency *CASO* appointments. Accept and support requests for new Users IDs. Assure that passwords are updated at agreed intervals. Assure that User access is removed when a CERPZone user leaves the organization, when system access has been suspended or revoked for any reason, and when there is any change to a user's access requirements.

Roles & Responsibilities for Web Team Room

Team Room Administrator (contact) – This role is assigned to control membership and access to each Web Team Room. There should be at least one Administrator from each Sponsor Agency (SFWMD & USACE). Administrator assignments will typically change over the life of the Team Room due to reassignment of the project manager of record or to delegate the administrator responsibility. The responsibility for timely notification of *Team Room Administrator* changes lies with the outgoing *Team Room Administrator*. If the outgoing administrator is unavailable to make the reassignments,

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the project manager of record or their supervisor (or delegate) will provide the information indicated below.

Requests for new Web Team Room areas or changes to existing areas should be submitted by the project manager of record, their supervisor (or designee), or an *IDM Web Liaison*. After approval, the *IDM Web Liaison* will forward the request to the *IT Web Administrator*. A member of the IDM Management group may, after a significant reorganization, check the list of administrators against new organization charts and request changes directly through the *IT Web Administrator*.

> All requests will contain the following:
> a) Name of the Team Room
> b) Name of the Team Room Administrator
> New requests will also include:
> c) A list of initial Team Room Members and associated permissions

IT Web Administrator - This role is provided as a single point of contact for technical and general knowledge issues pertaining to the site. The *IT Web Administrator* coordinates with the *Technology Management Board* and identifies appropriate personnel on the technical team to address specific issues. The *IT Web Administrator* also executes changes to Team Room Administration according to provided instructions and updates the Contact List.

Team Room Members - Team Room Membership is controlled by the *Team Room Administrator*. To gain membership to a Team Room, a valid user will email the *Team Room Administrator* by clicking on their email address as listed on the Team Room Welcome Page. The *Team Room Administrator* will create the user permissions as appropriate. After approval, the Team Room will be listed under "My Team Rooms" located on each team member's homepage. *Team Room Members* will update the *Team Room Administrator* on changes to their membership.

Web Content Manager - This role serves as the technical point of contact for content on the site and is responsible for managing the content presentation to ensure that it meets appropriate guidelines and for coordinating with designated *Content Owners* to edit existing content, build new content or website sections, and to post documents. This role ensures the consistency and continuity of the overall web appearance, content and structure. This role performs its duties by coordinating and managing content change

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requests from the *Content Owners* and by managing the release of the content to the site. The *Web Content Manager* is not responsible for the accuracy of the content but only manages the release and display of the content.

Roles and Responsibilities for CERPZone Applications

Application Controllers

Application Owner – This role owns the requirements of the application and is the main contact for feature changes and requests for the application. The responsibilities include informing users about the application and ensuring that the application meets the business need of the end-users.

Administrator – This role is given root level access limited to an application. The responsibilities include managing access to the application and the assignment or delegation of roles and responsibilities within the application.

Manager – This role is assigned a segment of the application to administer. The responsibilities for this role are defined by the administrator.

End-Users

User – A person who has access to use an application. The responsibilities include using the application as indicated, ensuring the accuracy of the content and providing feedback about possible issues including a desire for new features or features not fitting the business needs.

Viewer – A person who has the right to view the values and/or reports in an application but is not allowed to participate in changing values. Responsibilities are to ensure that the application and associated reports are usable and meet the business needs.

Roles and Responsibilities for Help/Training

User help and training is created based on a case by case basis. The appropriate forums are usually created in concert by the promoters and providers of the application by taking into account typical user knowledge and experience, complexity of application and the location of users.

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Some of the available types of help/training include announcements, online help, manuals, Computer Based Training (CBT) and live training.

Providers (IT Disciplines) – This role works with Promoters to provide appropriate help/training platform(s), provides technical information for using applications and assures that help/training content is kept current.

Promoters (Proponents of Applications) – This role works with Providers to determine appropriate help/training platform(s) and assures that help/training content is kept current. *Promoters* also provide promotional content and instruction content for subject matter training.

Users – This role takes advantage of the help/training that is offered and provides constructive suggestions when appropriate.

APPLICATION:

Effective as of the date of this CERP Guidance Memorandum, the staffs of both agencies will implement this guidance in accordance with the processes described above for all programs and projects utilizing the CERP Internal Web Site.

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APPROVALS:

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