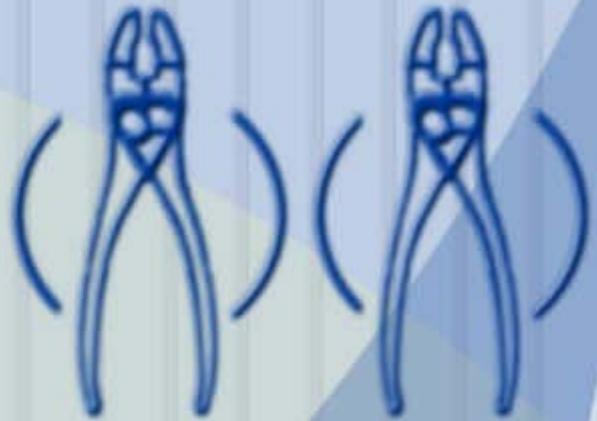


Content Management Requirements Toolkit

SAMPLE Version 2.0



Contains 133 fully-developed
CMS requirements, ready to
cut-and-paste into your tender

COMPONENT



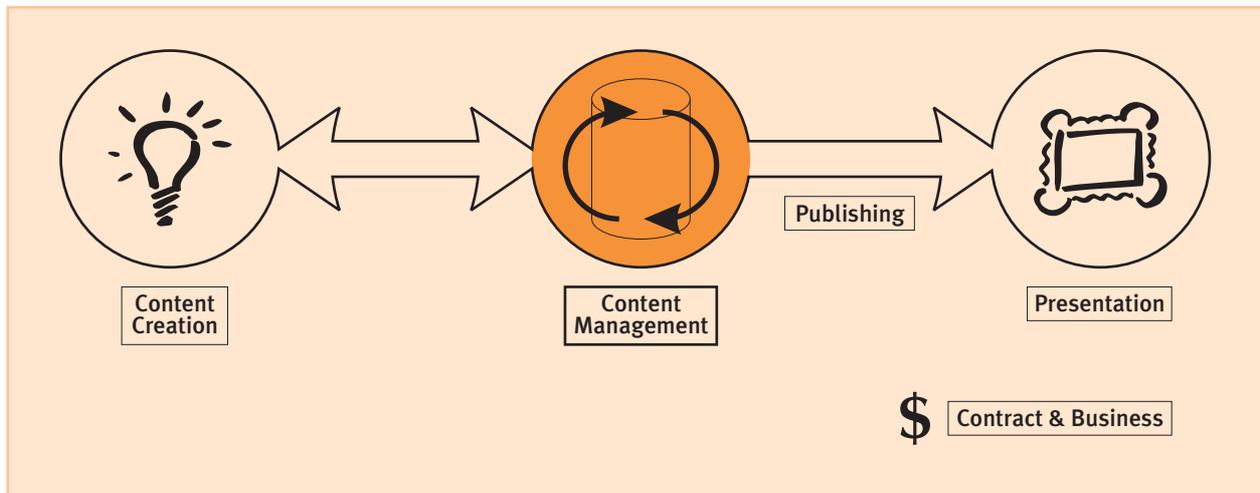
CMSLIFECYCLE



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8. Content management



Content management systems are built on a central repository, which holds all content, metadata, rules and supporting information. Around this, process and disciplines are established that ensure day-to-day activities run smoothly and efficiently.

The key to successful content management is *co-ordination*: addressing a wide range of activities in a consistent and structured way.

In this section

- 8.1 Version control
- 8.2 Date-based snapshots
- 8.3 Compare versions
- 8.4 Audit trails and activity logs
- 8.5 Workflow
- 8.6 Integration with enterprise workflow engine
- 8.7 Security
- 8.8 Public Key Infrastructure (PKI)
- 8.9 Electronic signatures
- 8.10 Virus scanning of uploads
- 8.11 Integration with external systems
- 8.12 Reporting
- 8.13 Proactive notification
- 8.14 Syndication of content to 3rd parties
- 8.15 Aggregation of content from 3rd parties
- 8.16 Automated release & expiry of topics
- 8.17 Automated archiving of content
- 8.18 E-mail notifications
- 8.19 Network management (SNMP)

In this section (cont)

- 8.20 Integration with corporate directory or authentication service
- 8.21 Deployment onto existing database
- 8.22 Open standards
- 8.23 Complete export of content
- 8.24 Replication
- 8.25 Routing feedback
- 8.26 Document repository
- 8.27 Image repository
- 8.28 Digital asset management
- 8.29 Document management capabilities
- 8.30 Digital rights management
- 8.31 Enterprise portal
- 8.32 Records management
- 8.33 E-learning support
- 8.34 Library management
- 8.35 User subscription for updates
- 8.36 Additional modules

8.1 Version control

All changes to the content must be tracked, and archived. It should be possible, via a simple interface, to locate a previous version of a page and restore it into the repository.

In the case of rollback, it should be possible to replace the current production content with the recovered version. This allows mistakes to be easily rectified.

8.2 Date-based snapshots

It must be possible to retrieve the state of the entire site on a given date. This is particularly relevant in legal cases which are based on the information presented on the site.

The recovered site must be fully functional, including the hypertext links, images and other related files. It would also be useful to view a historical snapshot of the site, without having to fully recover it.

To achieve this capability, the content management system must version all assets within the system, including:

- pages
- templates
- style sheets
- users
- security settings
- images
- documents

8.3 Compare versions

The CMS should provide in-built tools for comparing two different versions of a given page. The differences must be clearly and simply highlighted, so that the user can identify the key changes at a glance.

This is particularly valuable as part of the workflow process, to allow a reviewer to see the changes made in the version to be approved.

8.4 Audit trails and activity logs

Comprehensive logs must be kept of all relevant actions performed within the CMS. Of particular importance are the security audit trails, which track sensitive activities.

These activity logs must be generated automatically by the system, and protected against deletion. When necessary, log files must be 'rotated' to off-line storage, to prevent available disk space from being consumed.

There must also be a range of reports specifically designed to retrieve useful summaries from these logs and audit trails. It would also be useful for the CMS to expose the logs for external access (such as via ODBC), to allow third-party reporting tools to be used.

It is very important to be able to track the changes made by authors, to meet both legal and recordkeeping requirements.

8.5 Workflow

There is a need to be able to manage content from initial drafts through to published pages, with reviews at set points in the process. These reviews may be done by a range of people throughout the organisation.

This editorial and content review will be critical to ensuring that the content of the site is both accurate and up-to-date.

8.5.1 Simple workflows

The content management system must provide simple and easy-to-use workflow which provides at least the following features:

- multiple status settings for content items, such as draft, in review, published, expired, etc.
- simple linear workflows with a limited number of steps
- capture of comments entered by reviewers

It should also be possible to either escalate workflow steps automatically, or notify the relevant author or administrator of a delay in the workflow process.

When reviewing or approving content, users should have the changes to the page highlighted visually, thereby making it much easier for the reviewer to assess the modifications.

Most organisations will only require simple workflow capabilities.

8.5.2 Advanced workflows

Beyond basic workflow capabilities, the content management system will need to support a range of powerful features including:

- dynamic routing based on defined rules
- parallel workflows
- support for authorisation by staff groups, according to defined rules (majority, unanimous, etc)
- unlimited number of workflow steps
- automated initiation of activities at defined workflow steps (such as sending data to a third-party application)
- graphical views and editing of workflows

The vendor should outline any other workflow capabilities, and indicate how these would assist in meeting the business goals of the project.

Few organisations have found complex workflow rules to be successful, and a simple approach is encouraged.

8.5.3 Workflow administration

The content management system must provide an interface that allows the local administrators to create and modify workflow rules, without requiring either technical knowledge or vendor assistance.

This includes:

- creating new workflows
- deleting of workflows
- updating roles or steps in existing workflows
- modifying conditional rules

8.5.4 Reports

The content management system should provide a range of reports to assist the administrators in managing the workflow processes. These should include summaries of the status of the workflows that have been initiated, as well as reports highlighting any overdue workflow steps.

The vendor must provide a detailed description of the workflow reports that are provided.

8.6 Integration with enterprise workflow engine

The organisation already has an enterprise-wide workflow engine that is used to manage business processes across a range of systems and platforms.

The vendor should outline how the content management system can be integrated with this workflow engine, to provide seamless interoperability with other business systems.

This will only be relevant for larger organisations who have a well-established enterprise IT infrastructure.

Content Management Requirements Toolkit

Sample Version

This document contains only **six out of the 133 requirements** in the full Requirements Toolkit.

These requirements include:

Content creation

- WYSIWYG authoring
- Online forms
- Content reuse
- Cross-platform authoring
- Multiple languages

Publishing

- Stylesheets
- Page templates
- Support for multiple sites
- Publishing model
- E-mail marketing

Contract & business

- Training
- Service-level agreements
- Third-party software required
- Scalability
- Availability of source code

Content management

- Document repository
- Records management
- Integration with external systems
- Syndication of content to 3rd parties
- E-learning support

Presentation

- Usability
- Accessibility
- Human-readable URLs
- Valid HTML

+ 109 more requirements

- + guide to writing CMS scenarios
- + overview of selection process
- + dictionary of terms

Only US\$550, the **Requirements Toolkit** can be purchased and downloaded from:
www.steptwo.com.au