

Vendor Assignment: Informational Product Demonstration

The UC Davis Web CMS initiative is a campus-wide effort to implement a solution that will support the creation, management, delivery and sharing of Web content across the campus, while promoting compliance with organizational standards for branding, accessibility and communications.

As a critical component of the effort, the project's *Requirements and Evaluation committee* seeks to review and evaluate select pre-qualified Web CMS solutions, and will use its assessment to develop and document recommendations that will be provided to the *project team* and *steering committee*. To gather necessary background, the *Requirements and Evaluation committee* is inviting specific vendors to provide non-committal, informational product demonstrations.

Background

In late 2005, UC Davis began work to identify solutions that would address weaknesses in the organization's Web content, standards, systems and publishing methods. In addition to facilitating the use of the Web to support communications, information, and fundraising objectives, UC Davis sought to ensure campus-wide compliance with internal editorial, graphic and technical standards, and with legal requirements for content accessibility. In early 2006, UC Davis formally initiated the search for a Web Content Management Solution to meet the campus' Web publishing objectives by hiring necessary staff, implementing a project management system, and organizing a team dedicated to the pursuit of this goal.

The *Requirements and Evaluation committee* is responsible for guiding the identification and prioritization of the campus's requirements, defining key features and functions, identifying evaluation criteria, developing use cases, evaluating CMS options, and documenting the capabilities and fit of various software-based solutions. The committee is considering all aspects of the campus's needs and constraints, including technical, content and workflow, accessibility, interface, impact on staff workload, and other parameters. Members will also participate in the analysis and evaluation of potential options and the selection of a content management solution for the campus.

Presentation requirements and format

The *Requirements and Evaluation committee* has developed a formal functional and technical requirements document that will guide product and vendor identification and evaluation activities.

Representatives of select, pre-qualified Web CMS products are invited to show and describe the ability of their solutions to meet campus requirements as defined within the attached documents and compliance with the Web standards and policies described in Chapter 310, Section 70: <http://manuals.ucdavis.edu/ppm/310/310-70.htm> and Cyber-Safety standards and policy described in Chapter 310, section 22 of the UC Davis Policy and Procedure manual: <http://manuals.ucdavis.edu/ppm/310/310-22.htm>

In doing so, representatives are required to demonstrate the steps, processes, system features and/or functions that users of their product would employ to accomplish the objectives detailed in the given use case scenarios below.

The total duration of the presentation and subsequent discussion shall not exceed two hours. The following presentation outline is *strongly recommended*:

1. Introductions (10 min.)
2. Description of the product (20 min.)
3. Use case scenarios (demonstration) (60 min.)
4. Q&A period (30 min.)

To minimize technical and logistical constraints, Web-based presentations (i.e., WebEx, etc.) are strongly encouraged. For onsite product demonstrations, a computer with Internet connectivity and a projector will be provided. Requests for additional and/or specific computer hardware should be made at least one week prior to the scheduled demonstration. The fulfillment of such requests may not be feasible.

Prior to scheduling a demonstration, all participants are required to disclose information about their product's compliance with standards and policy for accessibility by completing and submitting Sections 1194.21 and 1194.22 of the Information Technology Industry Council (ITI) Voluntary Product Accessibility Template (VPAT), attached.

The committee also requires that you provide a list of client references in the higher education industry that we can contact for additional information pertaining to the implementation and use of your product.

Demonstrations must be scheduled with all required materials and information submitted by September 30, 2007, and presented by October 31, 2007.

Use case scenarios

1. A university department's webmaster contacts the Web CMS system administrator and requests that two new sites with the domains: *exampleone.ucdavis.edu* and *exampletwo.ucdavis.edu* be created. The sites will use different design templates.

The following new users need to be able to access *exampleone.ucdavis.edu* with the indicated levels of access permissions:

- a. 1 Webmaster (read, write, publish, delete, manages site)
- b. 1 Editor (review, write, publish, delete)
- c. 3 Authors (review own, write, submit for review)

The following new users need to be able to access *exampletwo.ucdavis.edu* with the indicated levels of access permissions:

- a. 1 Webmaster (read, write, publish, delete, manages site)
- b. 2 Editors (review, write, publish, delete)

Demonstrate the creation of the two requested sites, template selection and application, addition of users and implementation of the user roles as defined above.

2. A department's Web editor (Windows-based) assigns an author (Mac-based) to create a new Web page that includes text, 3 images, a table and a contact form. The editor also provides alt attributes for the images, keywords, a meta description and a user-friendly URL to apply to the page, if possible. The new page's copy is provided in a Microsoft Word document. The author receives the assignment, creates the page, places and formats the copy, table, form and images, adds the meta information and submits the page to be published to the requested URL.

The Web editor is notified that the page is ready for review and checks the author's work. The editor finds some typographical errors and rejects the page, providing comments to the author.

The author updates the page and resubmits to the system. The editor approves the page, applies an expiration date for 7 days from the publish date, and publishes the new page to the requested user-friendly URL.

Demonstrate the page assignment, page creation, content input and formatting and publishing processes associated with the above scenario, detailing the workflow and communication features within the system that maximize the efficacy of such processes.

3. You are a webmaster or CMS administrator who oversees 10-15 websites, each with its own domain, list of allowed users, workflows, etc. (In other words, these sites are all more-or-less independent.) However, since all these sites are in the same college at the University, they all contain references and links to each other. Two of the departments in your college have just merged and taken on a new name. How would you find and update all occurrences of the old names and links across all domains in your college? What would be the easiest way to merge the two previously independent domains (both implemented within the CMS) into a single unified site?

Additional information

Additional information may be obtained at the UC Davis Web CMS initiative Web site at <http://cms.ucdavis.edu> or by contacting the initiative's project manager:

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Enclosed/Referenced content

The following documents are attached or referenced herein:

- Functional and technical requirements
- UC Davis Policy and Procedure Manual, Chapter 310, Section 70
- Section 1194.22 of the Information Technology Industry Council (ITI) Voluntary Product Accessibility Template (VPAT)
- Section 1194.21 of the Information Technology Industry Council (ITI) Voluntary Product Accessibility Template (VPAT)
- UC Davis Web Content Management Initiative Web site (<http://cms.ucdavis.edu>)
- UC Davis Cyber-Safety Program (<http://security.ucdavis.edu/cybersafety.cfm>)