

Pierce County Web Content Management System Scripted Demo

General

The purpose of this scripted demonstration is to help Pierce County determine the suitability of proposed Web Content Management System (CMS) use at Pierce County. The objective is to provide selected software vendors the opportunity to show how their product will perform specific tasks that are central to Pierce County's operation.

Vendor demonstrations will begin with an opening presentation followed by scripted feature scenarios, as identified in this document. Attendees will be able to ask questions before, during and after the presentation, along with allotted time at the end of each scenario.

At the end of the scripted portion of the demonstration, each vendor will have the opportunity to show features and functions that are not covered by the script, but are thought by the vendor to be major differentiators of the vendor's software. There will be an hour allocated for vendor presentations of functionality, modules, applications, or capabilities of the system

Measurements

The overall success of the demonstration will be rated on a number of factors. These include:

- ◆ Amount of time required to complete a task.
- ◆ Number of steps (screens, mouse clicks, fields accessed, etc.) required to complete a task.
- ◆ Perceived complexity of the task solution (i.e., level of application knowledge required).
- ◆ Expected frequency of the task in day-to-day operation of the software (more commonly used features will be considered more carefully).

Attendees

The product demonstration will be performed in the presence of a number of people who will be using the software on a daily basis, as well as the Pierce County project team that is tasked with selecting the new software system. Observers should be able to ask questions and obtain clarification on points in the demonstration that are unclear. The answer to a question may be postponed until later in the demonstration, but all questions must be responded to prior to completion of the demonstration.

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Vendor Opening Presentation

In the opening presentation, vendors will be introduced to the Pierce County attendees and will discuss the following. Item numbers must be noted by presenter during demonstration:

- 1.1 User authorization and permissions:
 - Does the CMS use Microsoft Active Directory (groups or individuals) for user authorization and permissions? If the system does not use Active Directory, please indicate how authorization and permissions are managed.
 - Describe permissions for user and group administration, how promote rights are granted and how users may only work on permitted content.
- 1.2 Describe the manner or architecture of how layout and content is managed.

Feature Demonstrations/Scenarios

The following sections define the minimum features that must be demonstrated to prove the CMS software's suitability for use at Pierce County. The demonstrations outlined here do not need to be performed in the specific order shown here, but all demonstrations must be performed. Item numbers below must be noted by presenter during demonstration. If the software being shown does not support a feature required for the successful completion of a demonstration, the specific demonstration may be skipped, but it must be noted that no demonstration of the feature was shown.

2.0 Working with Templates and Site Design Features

(Use Exhibit 1 as a guide when creating the template for the demonstration – Banner, Left Menu and Navigation)

- 2.1 Demonstrate how templates are created, edited, deleted and secured by creating a template with items from Exhibit 1 and also add a footer.
- 2.2 Demonstrate the steps necessary to change a word in the navigation and how pages using that template get updated.
- 2.3 Demonstrate a method by which administrators can create friendly URLs (shortcuts).
- 2.4 Demonstrate the steps necessary to change images, links, and other items in the page banner or footer.
- 2.5 Demonstrate how to add, edit and move menu items affecting the overall site structure and organization. Explain how the CMS assigns rights to some users allowing them to edit

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department templates. Demonstrate ability of users to view others pages or content without being able to change them.

- 2.6 Demonstrate how to lock down styles for identity and secure it from Web content editors.
- 2.7 Show how template design and supporting CSS are ADA/508 compliant.
- 2.8 Demonstrate multiple—level navigation.
- 2.9 Demonstrate how to create and access multiple templates.
- 2.10 Generate a report detailing broken links on the Internet and Intranet website, including the referring page location.
- 2.11 Demonstrate website analysis, statistics and visitor profiling with the ability to use third party analysis tools if the county prefers.
- 2.12 Demonstrate how CMS complies with multi-lingual standards and regulations. Demonstrate ability for content to be translated into Spanish, Russian, Chinese, Korean, Vietnamese, and Cambodian.
- 2.13 Allow share options on a template.

3.0 Create A New Web Page

(Use the template created in 2.0 and add content as noted in Exhibit 2)

- 3.1 Create a new Web page using the CMS and demonstrate how the file is named, where it is stored, and how the HTML title is assigned. If content is stored in hierarchical directories, explain how subdirectories are created.
- 3.2 Show the content editing screen and explain the functions available to the user. Include undo/redo and spell check.
- 3.3 Demonstrate whether text can be copied directly from Microsoft Office software without markup (or with valid markup). Explain any special steps needed.
- 3.4 Demonstrate the use and acceptance of special characters in the content. CMS needs to allow special characters to be published to live website without error.
- 3.5 Demonstrate how to add a hyperlink to text or images. Show steps for adding a link to a PowerPoint file.
- 3.6 Demonstrate how to insert an anchor and link to it. Are heading tags automatically anchored?
- 3.7 Insert a bulleted list with five items.
- 3.8 Show ways content can be secured from view by other editors during test either through Active Directory groups, by a password, or through some user-initiated control.
- 3.9 Show how to preview the final Web version of the page prior to promotion to live website. Explain if there are other preview choices including preview mobile version, or preview in different browsers. Explain how CMS generates what is displayed on the mobile version.
- 3.10 Show the workflow for publishing including at least one permission from a supervisor and how edits are made during the workflow (for instance, if a supervisor notices a misspelling, can the supervisor make the change? Reject and return to the editor to fix? Etc.)
- 3.11 Show breadcrumbs and a dynamic sitemap.

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- 3.12 Demonstrate whether content can be scheduled for publishing and removal from live website. Will CMS generate an internal email alert to editor before removal?
- 3.13 Demonstrate extended and easy search capabilities for key words or phrases. Show a site search that offers results on PDFs, Microsoft files, Web pages and supporting information via integrated search engine or search application/appliance of organization's choice (i.e., Google). Demonstrate search capabilities for both Internet and Intranet.
- 3.14 Demonstrate a print-friendly option.

4.0 Edit an Existing Webpage

(Use the Web page created in 3.0)

- 4.1 Open an existing Web page using the CMS demonstrating ways the file can be found.
- 4.2 Demonstrate how to rearrange the contents on the page.
- 4.3 Show whether the content editor can access the HTML code for the page and make changes directly.
- 4.4 Explain whether the CMS allows all valid HTML tags or if the administrator can prevent some tags from being used.
- 4.5 Demonstrate how an editor can revert back to a "last known good" version of a page after an error has been made.
- 4.6 Show how to delete a Web page and its content. Demonstrate any warnings that would prevent an editor from deleting a page that has active links to it, or prevent the deletion of an image used on another page, etc.
- 4.7 Show whether it's possible to remove a published page while still being able to edit it in the test environment.
- 4.8 Show the error message when code is broken. Show the error message if user tries something not acceptable.
- 4.9 Show archive features and version control. Demonstrate how the archive report can be filtered. Show the user log including login history, user type, date and time of the attempted login, IP address of the user and whether or not the login attempt was successful.

5.0 Working with Images and Video

(Use Exhibit 3)

- 5.1 Show how to upload an image or file into the CMS. Explain how they are stored/organized, and how they are located for use on a page. Show any special search features or digital asset management functions. Show which pages they are being used on and the expiration date.
- 5.2 Explain whether the software allows all file types to be uploaded or if the administrator can prevent certain file types from being uploaded.
- 5.3 Insert an image onto a page. Show how to add ALT text, a caption, and a link to a full size version of the image. Show image text wrap options.
- 5.4 Demonstrate CMS functions related to images including the ability to resize, crop, create thumbnails, etc.

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- 5.5 Demonstrate building a slideshow containing a group of images and show the steps needed to insert the slideshow on a Web page. Show how captions and ALT text are inserted, and what user controls exist for advancing the slideshow and setting the speed.
- 5.6 Add video to a page with an embedded player.

6.0 Create Customer Contact Form

- 6.1 Create a Web page with a customer contact form that asks for: customer name, phone number, email address, comments and the ability to attach a file.
- 6.2 Explain the WYSIWYG form controls, options for collecting the data (email and database), accessibility/usability considerations, content validation for phone or email, and whether forms are accessible from any/most devices.

7.0 Intranet

(See Exhibit 4 for reference only. Vendors are not expected to recreate this page in detail.)

- 7.1 Identify and show any differences of the CMS system when working on Intranet content vs. Internet content.
- 7.2 Demonstrate functions of current Intranet home page (Exhibit 4) features: Internal messaging system (want ads on the current Intranet) that allows employees to post messages and upload images. The message system must allow administrator to delete messages.
- 7.3 Demonstrate adding an RSS feed.
- 7.4 Demonstrate adding a link to an outside application that allows information to be viewed on the Web pages. For example viewing job postings, surplus equipment, weather/traffic and kudos applications that are created with ColdFusion and Java. Explain whether the CMS supports alerts and reminders from other software platforms for display on the Intranet. This could be a discussion of the system's API.

8.0 Working with Tables

- 8.1 Create a Web page (use the template created in 2.0) that will include a table to be used for data or lists, not for layout.
- 8.2 Demonstrate how tables are inserted into the content. Can data from a spreadsheet be imported?
- 8.3 Insert a row into a table.
- 8.4 Insert a column into a table.
- 8.5 Demonstrate alignment and formatting features.

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9.0 Migration

- 9.1 Show the content of the following page in your CMS after migration:
<http://www.co.pierce.wa.us/pc/services/recreate/SpanawayPark.htm>

10.0 Other Questions

- 10.1 Describe the system's capability and functions for social network integration or capabilities.
- 10.2 Software Maintenance: Describe how regularly the software system is upgraded and/or enhanced. Describe costs. Explain the system's history of upgrades to software or database structures that required clients to migrate data or functionality to the new platform. What backward compatibility can be expected?
- 10.3 Software Features: Describe plans and features for the next year for the software system.
- 10.4 Support: Describe how CMS users get technical support for routine questions, expected response times, and hours of operation.
- 10.5 Training: Describe training options (super user, administrator, and user), available documentation/manuals, user conferences and other venues.
- 10.6 If CMS is a "hosted/cloud" solution: Describe failover, continuity of operation, data recovery, data export (any costs), system maintenance windows (advanced notice and scheduling) and internet connectivity (bandwidth, redundancy). How continuous operations will be achieved to maintain 24 x 7 availability.

Exhibits included

Exhibit 1 – Banner, left menu, Navigation

Exhibit 2 - Sample Pierce County Web page

Exhibit 3 – Images

Exhibit 4 – Pierce County Intranet home page screen shot with descriptions