

Appendix 8 CMS Functional Requirements

The new Web site should allow staff to upload new material and revise existing content, including text, PDF documents, images and videos.

Requirements are listed below and organized by what the CMS needs to have, and what we would like the CMS to have if budget allows.

NEED TO HAVE

Page editing

- Ability to approve pages created by other people in fewer clicks than SharePoint
- Ability to create draft test pages with “Lorem” in chosen text fields and image placeholder
- Ability to pull document and information from Foundation Connect (CEPF grant database)
- Ability to store and display tabular data, for example, a table of geo coordinates can populate a Map
- Have something that works like a SharePoint List (e.g. the ability to consume REST and present tabular data)
- Add pages or assets to a favorite list, for easy access
- Content bank
- Tagging
- Set permissions at the page level
- Create asset inventories, ex. number of pages and which pages are module X or image Y being used
- Give access to non-CEPF users to review content in draft
- Move pages, folders, and assets in an easy UI
- Password protect specific directories, pages, and documents
- Receive alerts when page status changes (created, expiring, modified, published)
- Support editing pages in Chrome, Firefox, and IE
- Have several versions of the content (version control)
- Site design and features to work cross platforms natively without much tweaking

Page templates and modules

- Metadata and tag fields for assets and pages (not related to HTML metadata)
- Modular design approach, where the user can drag and drop modules (like slideshow, photo mosaic, etc), insert new modules in pages

- Option to have static modules already placed

Performance

- Fast to load and avoid the “Flash of Unstyled Content” (FOUC)
- Few libraries to load. No unneeded JavaScript and CSS libraries should load for read-only view

Multiple-Language Support

- Enter content in Japanese, Spanish, Portuguese, etc (double byte characters)

Search

- Easy to create synonyms for search, for example: Fax, eFax, e-Fax, etc.
- Easy to force full site crawl
- Weighted page search, highlighting pages with importance

Third-party tools

- CMS-generated online forms, or third-party integration
- Integration with
 - Google Analytics
 - Google Tag Manager
 - FoundationConnect
- SEO sitemap out of the box, with option to force refresh
- Capture and consume user behavior in 3rd party tools, ex. FoundationConnect, Google Analytics

General

- Ability to create friendly, custom URL, and URL routes (Pretty URL)
- Accessible documentation for editors and admins
- Intuitive admin and editor interface
- Set some pages as draft, and approve them to go into the live website
- When expiring a page having the option to redirect, or give a 404 error
- Ability to link to “social proofs”, showing number of shares, subscribers, email
- Easy to add 3rd party JavaScript and iframe
 - Support multimedia such as video (autoplay), images, clickable maps, infographics, full bleed or not
 - Ability to embed iFrames easily
- Add widgets/portlets (webparts?) on pages
- Consume RSS feed and style for the site
- Create RSS feeds by metadata, sites, content type, all site
- Integrate with 3rd party code; ex. embeds from other sites (like youtube, external forms, external comment engines)

- Make small changes in the site design and features without a need for a third-party
- Reuse content across the site (reusable content)
- Support several domains and subdomains, and redirect to a subsite or a site
- Access to a large catalog of plugins that are maintainable and easy to install
- CMS produce URLs for pages and sites that are compatible with SEO naming convention
- Create lightbox/photo slideshow and style easily, automated as possible
- Custom 404 page
- Customize navigation elements like left side navigation, breadcrumbs, top bar navigation, that can be added, removed, or revised without a full redesign
- Robust internal and external search that can be driven by content types (ex tags, keywords, fields) and content
- Intuitive interface to manage content and site structure
- Reuse the same photo in multiple galleries
- Index pages that crawl the content automatically (like pages, lists, assets), from sites and subsites
- CMS system to be affordable in terms of license, maintenance, and implementation
- CMS to be able to support 100,000 assets and 800 subsites
- CMS to be easy to update (patch) and maintain
- CMS to have a good web-based content editor
- CMS to have a large community of support
- Social media is able to get the right title and photo from the page (ex Facebook meta-tag)
- Customize the site as much as possible in-house
- Design or redesign the site without the need to get vendors involved; the code needs to be simple so we can do our own maintenance
- Filter the index pages by several criteria
- Generate reports for approval, page deployment schedule, page expiration, broken links
- Fast loading and lightweight CMS in production and development

WANT TO HAVE

Page editing

- Image renditions (or image transforms), ability to load one image and automatically resize and set the crop/view window, also present the same image optimized for different devices automatically
- Ability to pull a document from SharePoint Online (Office 365) into the site

- Advanced WYSIWYG editor
 - Option to enable or disable HTML sanitize (allow/disallow JavaScript, allow/disallow html tags and parameters, etc.)
 - Option to add or block JavaScript code
 - WYSIWYG editor does not insert junk code
 - Preview pages in draft stage, before it gets approved
 - Views like Dreamweaver: Design, html code, and split
- Tagging with auto cloud tagging based on content
- Option for live editing preview

Page templates and modules

- Module (coding) Integration with GIT, Continuous Integration, and Version control
- Modules based on templating (like Craft CMS templates)
- Trickle down module updates. In case module X is updated, all modules X across site will be updated as well

Multiple-Language Support

- Editor interface
- Same page in different language versions
- Page templates in different languages
- Option to translate the subsite master template
- Explore the option of adding a Spanish language website

Search

- Predictive

Third-party tools

- Adding or editing SEO and Facebook / twitter cards' metatag fields from the editor interface
- Auto meta-tagging based on content, for SEO and facebook / twitter cards
- Integration with
 - Vault (asset management) - <https://tandemvault.com/>
 - Pixel tracking tools
 - Email client

Personalization

- Custom content fed to users based on their behavior from content within the site. The source could be internal or external sites (blog, social, post, videos, etc).
- Geo reference content (IP mapping)



General

- Ability to add a bug collector form (ex. Jira) in the system
- Allow to enable comment to pages using OpenID (Facebook, Google, etc) using Disqus
- Set up different workflows depending of type of content, site, or subsite (partner site)
- New system to import data from old system in a friendly way