

**ATTACHMENT 9**  
**FUNCTIONAL REQUIREMENTS**

**1. Functional Requirements: Narrative Questions**

*(If possible, please limit responses to one page or less.)*

- a. How does the web content management system (WCMS) work with a hierarchies/taxonomies and indexes? How can taxonomies determine or control the site design in conjunction with the WCMS? What does the WCMS require of the taxonomy and metadata plan for optimal implementation and support of information access?
- b. How does the WCMS handle large batches of content, during migration and in an ongoing basis, in structured and unstructured formats? How does one import and export such batches? How can users make changes to existing content in large batches?
- c. What kind of tools does the solution offer for site visitor/end-user/subscriber management, especially with regard to viewable content for segmented user groups in an authenticated and secure environment?
- d. What authentication tools or systems does the WCMS integrate with or support?
- e. What, if any, newsletter production tools does the WCMS offer? Does the WCMS offer users the ability to “subscribe to a page” or otherwise manage notification features?
- f. How does the WCMS support dynamic content based on database queries?
- g. How does the WCMS support dynamic content based on rules?
- h. What standard web site utilities, tools, and modules are included with the WCMS? (e.g. email-to-a-friend, printer friendly versions, text resizing, social media, other interactive tools.)
- i. Describe the WCMS preview, development, and staging environments. Please provide screen shots. Describe any limitations or dependencies related to the preview capabilities.
- j. Describe how the WCMS can interface/interact with external applications. Can calls to other applications be integrated within a workflow?
- k. How does the WCMS manage a library of reusable images; .pdf files, audio or visual files, and other multi-media file types? How does the WCMS enable users to upload files in meaningful ways and find the files they need?

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- l. How are duplicate files and file updates managed? How are deleted files and links managed?
- m. How do external search applications integrate with the WCMS?
- n. What kind of content back-ups are available? How is the content separated from or associated with the template code? Please provide sample back-up files per section 8.18 (Reference Documents) of the RFP.
- o. Outline the skills required to develop and maintain your solution.
- p. AOC legal counsel has advised that the AOC and appellate courts adhere to web-related accessibility standards outlined in federal U.S. Section 508 of the Rehabilitation Act (as amended). Additionally, the AOC and appellate courts intend to voluntarily adopt an extended set of accessibility standards (specifically, WCAG 1.0 Priority 1 Checkpoints), along with custom privacy and linking policies.

Please address the following questions related to accessibility: *For this narrative question, the response does not need to adhere to the one page limit.*

- Discuss how and to what extent your product suite meets Section 508 standards. Please cite particular subparts and sections (e.g. “Subpart B § 1194.21 Software applications and operating systems.”), where applicable. Also, in describing compliance, distinguish whether said accessibility feature is (a) incorporated within the product suite or (b) compatible with third-party user assistive technology.
- Regarding Section 508, Subpart B § 1194.22 Web-based intranet and internet information and applications, specifically discuss how your web content management solution can allow the AOC and appellate courts to control/prevent non-compliant web content (i.e. web content that does not meet 508 standards, WCAG checkpoints, and/or other custom privacy, linking, or legal policies) from being published to our web sites.
- Discuss how your solution exceeds federal accessibility standards or results in additional benefits in this area, if at all. For example, can your solution automatically optimize web content delivery for screen readers, mobile devices, and RSS feeds? Does your product provide easy-to-use alternative, text-only/XML site management?
- Discuss any shortcomings that your solution may have in the area of accessibility and how these limitations might otherwise be addressed.

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**2. ITEMIZED REQUIREMENTS**

Use the following key to respond to each itemized requirement. Please also include a comment for each item. Identical comments may be applied to multiple requirements as appropriate.

<b>RESPONSE CODES</b>	<b>DEFINITION</b>
5	Item is "Out Of Box"- indicate module or software product. No modifications or customized code will be required for the system to meet this requirement.
4	Item will be included in future release - specify version and date. The requirement will be implemented as part of a scheduled update to the software package. No additional purchase or other cost will be incurred, and customized code will not be required. Please specify the planned release version for the functionality and scheduled release date, if possible.
3	Item addressed by third-party integration- specify partner. The requirement is met by third party integration or partner functionality and can be implemented seamlessly by the vendor responding to the RFP. Please specify the third-party product and partner meeting the requirement.
2	Item requires customized code to be written. To meet this requirement, custom code will be required during implementation. Please briefly describe the customization(s) required. Within the Cost Submission Matrix, also provide estimates of work required to complete the customization
1	Item not addressed by solution. This requirement cannot be met by the vendor or vendor partners and will not be included in any future release.

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**3A. Content Creation**

	<b>REQUIREMENT</b>	<b>RESPONSE</b>	<b>COMMENTS</b>
3A.1	System shall support tools to facilitate metadata generation during content item creation, including keyword "pick lists" to allow metadata to be chosen from a pre-defined schema.		
3A.2	System shall provide the ability to create a number of predefined and/or customizable templates using a combination of elements including: navigational elements driven out of a metadata repository and defined taxonomy, static links to other internal/external sites, pages or applications, plain/formatted text elements, images and aggregated content items.		
3A.3	System shall provide the ability to create and edit site links using a simple browser template option.		
3A.4	System shall provide the ability to create an automated "breadcrumb" trail.		
3A.5	System shall provide the ability to create new navigation structures with a minimum of effort.		
3A.6	System shall provide the ability to create, edit and spell check text using a simple browser template option.		
3A.7	System shall provide the ability to easily create web-based forms (e.g. Feedback, Notification, membership registration). The forms will validate input data within the form. If possible, this shall be a "wizard" like tool usable by non-technical users.		
3A.8	System shall provide the ability to build navigation structures in languages other than English (LOTE).		

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	<b>REQUIREMENT</b>	<b>RESPONSE</b>	<b>COMMENTS</b>
3A.9	System shall provide the ability to import and manage images using a simple browser template option		
3A.10	System shall provide the ability to import content items or attachments from the AOC standard operating environment using a simple browser template option.		
3A.11	System shall provide the ability to automatically generate and update a site map for each website.		
3A.12	System shall provide the ability to automatically set or change dates for review, publication and expiry of a content item dependent on AOC business rules (e.g. author, content item type or site standard/policy for review dates).		
3A.13	System shall provide the ability to manually set overrides for content review, publication and expiry dates.		
3A.14	System shall provide the ability to review/approve content and metadata within a single workflow process.		
3A.15	System shall provide the ability to create chunks of content that can be published in multiple site locations.		
3A.16	System shall provide or integrate with tools used to author web based programs that can generate dynamic content in several formats (e.g. pdf, html, xml, rtf).		
3A.17	System shall provide the ability to create items of content for delivery in multiple environments and for multiple files in a single environment.		

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**3B. Content Publishing and Quality Control**

ITEM	REQUIREMENT	RESPONSE	COMMENTS
3B.1	System shall support central and decentralized role-based content publishing.		
3B.2	System shall support automated publication of content items based on completion of review/approval workflow processes.		
3B.3	The system shall support various types of workflows including Serial, Parallel, Rules based, and Adhoc routing.		
3B.4	The system shall allow for user annotations/comments during the workflow without changing the content.		
3B.5	The system shall track the details of the user, date-time for check-in/check-out.		
3B.6	The system shall allow for content filtering depending on user type and permissions.		
3B.7	System shall provide a link checking utility to detect, notify, manage and allow maintenance of internal and external broken links.		
3B.8	System shall provide the ability to automatically check for, identify, notify and update/refresh links that reference content that has been moved, removed or expired.		
3B.9	System shall provide the ability to maintain synchronization, automatically updating appropriate content used by multiple pages or sites so that it remains consistent.		
3B.10	System shall provide the ability to manage versions of individual content items and pages (e.g. including details of records such as publishing and revision dates,		

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ITEM	REQUIREMENT	RESPONSE	COMMENTS
	activities, content creator).		
3B.11	System shall provide the ability to manually override automatically generated review and expiry dates for content items based on role.		
3B.12	System shall provide the ability to migrate content and links to another WCMS.		
3B.13	System shall provide a method for migration of existing web content and structure into the WCMS from legacy sites, systems and data repositories.		
3B.14	System shall provide the ability to publish/unpublish a single item of content in multiple delivery environments with the option of different delivery requirements/templates (e.g. displayed on Intranet, Extranet and Internet sites).		
3B.15	System shall provide the ability to publish multiple variations of a single content source to a variety of web page contexts on the same website or to different websites (e.g. for different audiences, languages, summary or full version of the content item).		
3B.16	System shall provide the ability to schedule the automatic publication or removal of content items within a single site or across more than one website generated by the WCMS.		
3B.17	System shall provide the ability to publish/unpublish content items to more than one website generated by the WCMS.		
3B.18	System shall provide the ability to publish/unpublish content items to one or many locations within a single site.		
3B.19	The system shall support the		

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ITEM	REQUIREMENT	RESPONSE	COMMENTS
	means to rollback content when needed including both incremental and wholesale rollback.		
3B.20	System shall provide the ability to search, preview and replace a content item across the site or sites managed by the WCMS based on AOC business rules.		
3B.21	System shall provide the ability to view content items in-context via a browser, to see how the content item will appear in the website- (what you see is what you get) preview. The browser option shall ensure the preview pages are not exposed to external search engines.		
3B.22	System shall provide the ability to view a list of content items based on status of review and expiry dates.		
3B.23	System shall provide the ability to view all changes of content in previous version.		
3B.24	System shall provide the ability to view history of all template changes.		
3B.25	The system must support a complete revision history of changes, "audit trail" of activities, including revision comments		
3B.26	System shall provide check-in/check-out control for each content item stored in the content repository.		
3B.27	System shall support automatic updating of navigation structures as the site structure, predefined templates and content items are updated.		
3B.28	System shall provide the ability to publish content in Languages other than English (LOTE).		



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<b>ITEM</b>	<b>REQUIREMENT</b>	<b>RESPONSE</b>	<b>COMMENTS</b>
3B.29	System shall provide the ability to edit content items and route for review/approval without affecting the published work.		
3B.30	System shall provide the ability to set, validate and enforce mandatory compliance and performance standards/rules (e.g. accessibility compliance, page size and speed or broken links).		
3B.31	System shall provide the ability to import/export associated content records (eg metadata).		
3B.32	System shall provide reports on associated content records.		

**3C. Content Presentation**

<b>ITEM</b>	<b>REQUIREMENT</b>	<b>RESPONSE</b>	<b>COMMENTS</b>
3C.1	System shall provide the ability to modify a navigation menu look and feel via templates.		
3C.2	System shall provide the ability to modify the navigation structure while automatically maintaining links to published content items.		
3C.3	System shall provide the ability to select from a number of predefined and/or customizable templates to control the visual presentation of content items.		
3C.4	System shall provide the ability to separate design from content through the use of templates.		
3C.5	The system shall support print-friendly and email-friendly versions of each page.		
3C.6	The system shall include the ability for end users to		

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ITEM	REQUIREMENT	RESPONSE	COMMENTS
	increase/decrease all font sizes on each page (typically three sizes).		
3C.7	System shall provide the ability to generate delivery templates and published content using Cascading Style Sheets (CSS).		
3C.8	System shall adhere to section 508 standards for disabilities. Standards shall apply to both WCMS output and to the solution interface used by administrators and content developers. (1194.21 and 1194.22)		
3C.9	System shall comply with W3C web standards.		
3C.10	Ability to display content items and search for content in languages other than English (LOTE).		
3C.11	System shall support explicit customization of information delivery by user and/or user role. The system shall have the ability to tailor content and content presentation based on data provided by the user, an established/stored user profile or user type (e.g. presiding judge, attorney, AOC Manager) or logged by the system for anonymous site visitors or guests.		
3C.12	System shall have the ability to save data entered by users in context of the site or web based program (and associate with user profile, if available).		
3C.13	System shall provide logging/tracking tools to support customization, e.g. the delivery of tailored or specific		

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	information and services to an anonymous site visitor.		
3C.14	System shall provide the ability to generate a plain English URL for key web pages for easy referencing by non-technical end users and search engines.		
3C.15	System shall provide the ability to manually create a specific URL link for a site page, overriding system generated URLs.		

**3D. Interdependencies**

3D.1	REQUIREMENT	RESPONSE	COMMENTS
3D.2	System shall support content contribution from external (non-network) parties.		
3D.3	System shall provide the ability to integrate with third-party site analytics and reporting tools and services (e.g. WebTrends Analytics 8).		
3D.4	The system shall allow for integration with third-party search engines.		
3D.5	System shall provide the ability to interface with the AOC MS Exchange systems for workflow tasking, scheduling and collaboration.		
3D.6	The system shall integrate with 3rd party syndication tools including RSS.		
3D.7	System shall support both inbound and outbound content syndication (e.g. inbound: news, weather, police alerting services; outbound: RSS feeds).		
3D.1	System shall have the ability to receive chunks of content, aggregate and/or present content		

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3D.1	REQUIREMENT	RESPONSE	COMMENTS
	from external sources (e.g. California Trial Court websites), and make that content available for reuse (via RSS feeds or other mechanisms).		