

# Annex I – Scenario for award criterion 1 for Lot 2- RedDot

## Technical Specifications

### for the construction of Cedefop’s RedDot-based WebSite

#### 1. INTRODUCTION

##### 1.1. Purpose

- 1.1.1. Construct a revamped web site for Cedefop, based on RedDot CMS, resulting from a merger and improvement of the content, structure and functionality of the two major web sites of Cedefop, i.e. [www.cedefop.europa.eu](http://www.cedefop.europa.eu), Cedefop’s corporate information web site and [www.trainingvillage.gr](http://www.trainingvillage.gr), Cedefop’s “interactive” web site.
- 1.1.2. Emphasis is given to: content aggregation and interrelation using metadata; intuitive navigation and usability; de-centralised, user-friendly content management capabilities; excellent reporting, statistics and search capabilities; quick responsiveness and optimal performance; standards compliance.

##### 1.2. About the proposal

- 1.2.1. The tenderer should provide a proposal for the production of the web site as described in the following sections. Items under section 3 (1<sup>st</sup> deliverable) should be implemented within 3 months of the signature of the contract; items under section 4 “Second deliverable - milestone 2” can be concluded later.
- 1.2.2. The proposal should indicate the number of work-days needed to implement a first version of the website, broken down by analysis, development and project management (according to the profiles of section 2.2 of the main part of the Call) as well as off-site and on-site work. **The time-schedule for the implementation should be included** (starting point is the signature of the corresponding specific order).
- 1.2.3. Specific estimations (person-days) should be given as detailed as possible for the different parts of the proposal (i.e. how many work days will be needed for each different part of the design and the implementation). Estimations shall be binding in case of orders of identical services.
- 1.2.4. The tenderer should note that part of the information design / content organisation / creative design concept will be made readily available and handed over after signature of the contract. A draft version of the sitemap and some wire-frames are included in Annex Ia, Ib, Ic.

#### 2. DEFINITIONS - GLOSSARY

This section provides reference definitions for terms used later in the document.

## 2.1. Users

The users of the system, which are referenced in sections below, are defined as follows:

- 2.1.1. *Web Portal Administrator (CMS)* - The person(s) in charge of the system and service administration;
- 2.1.2. *Content manager (CMS)* - Contributor who adds, edits or deletes content items, but can't approve for publishing;
- 2.1.3. *Content editor (CMS)* - Specific role is to approve content items for publishing;
- 2.1.4. *User / Visitor* – any visitor to Cedefop's web site;
- 2.1.5. *Registered user* – The User who has registered and who logs-in on the website, by supplying username and password.

## 2.2. Content Types

- 2.2.1. *News Item* – A content item which announces something new. Properties/Metadata: title, description (text description of news), attachments (one or more), start-end date for publishing the news item; type/subtype (type: “announcements”, “calls and vacancies”, “press releases”; subtype e.g. for “calls and vacancies”: vacancy notices, calls for tenders)
- 2.2.2. *Event* – A content item which announces a forthcoming or past event (e.g. Conference, Exhibition, etc.). Properties/Metadata: name/title, description, start/end date of event, venue (where the event takes place), Internal/external; Cedefop involvement (“organiser”, “co-organiser”, “host”, “participation”, “cooperator”, “none”), type (“conference”, “exhibition”, “other event”)
- 2.2.3. *Download* – A content item representing a file available for download. Properties: name, description (in HTML), file size, number of times it was already downloaded, date first published, version, language
- 2.2.4. *FAQ* – Frequently Asked Questions - Is a content item which represents a set of questions and their answers. Properties: name/title, description, metadata
- 2.2.5. *Information Resource* (e.g. special Cedefop application or database, the library system, etc.) – Is an HTML content item which describes and links to an information resource. Properties: name/title, description, link to the actual resource, metadata
- 2.2.6. *Statistics and Indicators* – Are HTML content items, which represent statistical information. The information of each item is available, in static form, in excel downloadable file, graph (picture), html. Properties: name/title, description, metadata

- 2.2.7. *Link* – Is a content item which represents a link to another web site or other section of the same website. Properties: name/title, description, metadata
- 2.2.8. *Dynamic Bibliography* - Dynamic bibliography pages are HTML pages which include links grouped by categories (metadata)
- 2.2.9. *Generic HTML page* (Text/graphics) – A simple HTML content item. Properties: name/title, description, metadata
- 2.2.10. *Institution* – Is a content item representing an Institution. Could be applied as metadata to other content items (e.g. event organised by institution “x”). Properties: name, address, metadata
- 2.2.11. *Person* – Is a content item representing a person (or contact). Persons can belong to Institutions. Could be applied as metadata to other content items (e.g. news entry added by person “x”)
- 2.2.12. *Network* – Is a list of Institutions.

### **2.3. Metadata – Closed Lists**

- 2.3.1. *Topics* (Topic / Theme / Subject) (e.g. “Lifelong Learning”, “Skills”, “Transparency”) are the high-level business thematic classification metadata, used to group and organise content and they consist at least of a name and a description;
- 2.3.2. *Activities* (Activity / Project) (e.g. “Skillsnet”, “European Journal of VET”, “Teachers and Trainers project”) correspond to the classification of Cedefop’s projects/activities, they are metadata used to group and organise content and consist at least of a name and a description;
- 2.3.3. *Closed list of Languages*: Greek, French, etc; *Countries*: Greece, France, Belgium, etc. Should be able to add/delete from closed lists
- 2.3.4. Two-level hierarchy of *Keywords* (Controlled Vocabulary List – CVL): e.g. adult learning, transparency, mobility, EC policy, non-formal learning, skills development / skill shortage, youth policy, social dialogue, sectoral training, quality of education, ...
- 2.3.5. Per content item specific closed-lists. E.g. list of *news types*: “announcements”, “calls and vacancies”, “press releases”; list of *event types*: “conference”, “exhibition”, “external meeting”, “internal meeting”. Cedefop involvement in an event: “organiser”, “co-organiser”, “host”, “participation”, “cooperator”, “none”.

### **2.4. Other terms**

- 2.4.1. *Templates* – Are content containers, proposing a specific structure and layout where content can be added.
- 2.4.2. *Workflow* - Moving components through a pre-defined cycle of creation, revision, approval and deployment. A workflow process can

be initiated by a human, an event or by other triggers, such as the passage of time.

2.4.3. *Livelihood* – The back-end document management system and global file repository for Cedefop.

2.4.4. *Email Alerts* – E-mail messages sent when triggered by events such as new content item added or changed.

2.4.5. *RSS* – RSS Web feeds are a way to codify frequently updated content in a structured format, which users can view in their favourite reader application (e.g. Outlook 2007), is transmittable to other on-line services, or re-usable within the same system.

2.4.6. *Permalink* - A permalink is a URL web address that points to a specific content entry which remains unchanged and valid indefinitely. (for a definition of permalink see also: <http://en.wikipedia.org/wiki/Permalink>)

### 3. **1ST DELIVERABLE (TO BE DELIVERED 3 MONTHS AFTER THE SIGNATURE OF THE CONTRACT)**

Build a website based on RedDot, with adequate content management capabilities and metadata-driven content delivery.

#### 3.1. **Set-up and installation of RedDot**

Set-up RedDot CMS for use on the given server and configure it to publish on the production, publicly visible web server. Configure, in cooperation with Cedefop, any connections with the Database Server, with Livelihood (see paragraph 3.2.6), with the E-mail and at the Firewall. Cedefop can support on all issues of system (operating system), network and security (firewall) administration.

#### 3.2. **Content Authoring Specifications**

##### 3.2.1. *Content Authoring*

3.2.2. Content manager shall be able to create new *content items* as well as edit, version, archive, and delete existing ones. Content item is a generic term for any object in the WCM but it includes: News Item, Event, Job Opportunity / Vacancy notice, FAQ, Information Resources (e.g. Cedefop databases), Statistics and Indicators, HTML page (Text/graphics), Downloads (see section 2.2).

3.2.3. Administrator shall be able to create new *Topics* (Topic / Theme / Subject) as well as edit, version, archive, and delete existing ones.

3.2.4. Administrator shall be able to create new *Activities* (Activity / Project) as well as edit, version, archive, and delete existing ones.

3.2.5. Content manager shall be able to create new *Dynamic Bibliography* pages as well as edit, version, archive, and delete existing ones.

3.2.6. Content manager shall be able to select documents from the Document Management solution (Livelink) and assign them to relevant content items.

3.2.7. *Templates*

3.2.8. Authors shall utilize templates for creating new content items. Overall layout is specified via page templates and/or style sheets for the final appearance.

3.2.9. WCM system allows template creators to create new templates and/or to edit or delete existing ones. Only approved templates can be used to format published pages.

3.2.10. Approved template changes are applied immediately to all relevant content items.

3.2.11. *Usability*

3.2.12. WYSIWYG editor enables Content Managers to add content items without any knowledge of HTML.

3.2.13. Content Managers manage content through a state-of-the-art, simple, user-friendly, powerful and intuitive user interface.

3.2.14. *Workflow*

3.2.15. WCM supports ca 20 content managers and ca 5 content editors, along with groups, roles and permissions (e.g. Administrator, Editor/Moderator, Manager/Contributor). Different content managers and editors shall have permission to only manage their own part of the website.

3.2.16. Workflow shall support content managers submitting potential content for consideration to the Content Editor.

3.2.17. Content Editors can edit, comment, reject, and/or approve any submitted (new or existing) content items falling under their responsibility. Only approved content items can be published as final.

3.2.18. WCM system keeps track of the workflow-related status of each content item and users can move content forwards-backwards in the workflow.

3.2.19. *Asset Management* - One instance of a content item can be displayed on or linked to from multiple web portal pages, i.e. re-utilization of content (single-sourcing).

**3.3. Metadata-Driven Delivery**

3.3.1. Content items shall contain system-driven as well as user-generated metadata, to facilitate operations such as information delivery and retrieval, interrelation with other content, search/ browse or

aggregation by subject, type, date, grouping, user language display and archiving.

- 3.3.2. Content managers shall be able to select metadata from existing predefined *lists* (like list of keywords (“CVL” or Common Vocabulary List), list of users/contacts, list of countries, etc. - see section 2.3) and assign them to relevant content items. All closed-lists have a common source and are globally accessible throughout the site, indexing all content items of the site.
- 3.3.3. Visitors will be able to browse through the content, viewing the content through its different grouping mode, based on the metadata applied to it. The system can aggregate and present appropriately, "*related*" content items on each topic/theme page and on the front page, based on the metadata applied to it and on other properties it has e.g. keywords (CVL)-based listings, "new" items based on 'date' property, country-related content.
- 3.3.4. The metadata closed-lists (see description in 2.3) infrastructure should be open and available for use to various third-party content repositories, like discussions forum, polls software, e-mail newsletters and their archives, etc. It should be possible to tag this third-party content with the same set of metadata hierarchy.

#### **3.4. Content Delivery Specifications**

##### *3.4.1. Publishing*

- 3.4.2. Visitors are able to specify and control some preferences on their current session, without registering (e.g. font size of site, language).
- 3.4.3. Users can select the language in which the interface and content is displayed (interfaces will be provided in EN, FR, DE, maybe ES). When a content item is not available in the language chosen, EN version will be displayed (default).
- 3.4.4. Users should be able to display printer-friendly formatting of pages (*print this page*), and / or email a link to a page to a friend

##### *3.4.5. Downloads*

- 3.4.6. The documents for download will be organised according to the metadata applied to them; i.e. have a global download section but also display the corresponding documents under each Theme or Project page.

3.4.7. The web portal will allow users to download each document in any available language version, format etc. and will provide an HTML (sub-)page describing each one. The contractor may consider using the document's metadata as these reside in Livelink.

3.4.8. Web portal should display the size of the file available for downloading.

3.4.9. Web portal should display the number of times the document has already been downloaded, for each document available for downloading, by displaying a counter next to the item.

#### *3.4.10. URLs*

3.4.11. User can expect a human-friendly and consistent syntax for URLs.

3.4.12. Each object in the repository should be accessible through a unique URL. It should be easy for users to copy this URL and paste it in an email or document as "reference" to the object in the repository.

3.4.13. System supports and uses *Permalinks*. (see above for definition)

#### *3.4.14. Usability*

3.4.15. Usability: ease of use, intuitive navigation for the visitors through the site

3.4.16. Single Access Point by providing one entry point via Cedefop main website

3.4.17. Consistent nomenclature within the website (consistent navigation / section names / content labels)

3.4.18. Consistent and harmonised Look and Feel, following Cedefop's corporate identity - position of Global Navigation bars (Top and Side), Footer, Global Menus, Search bar, Title bar, Search entry, colours, fonts, sizes

3.4.19. Breadcrumbs navigation should exist, so that users have visual display of how deep into the website they have navigated

3.4.20. Users will find contextual help links on a given page leading to the corresponding help pages directly (vs. a link to a generic Help page).

#### *3.4.21. Registered Users*

3.4.22. Users can register easily with just their email address. System automatically emails a link to confirm/complete registration. Users confirm registration following emailed link and complete registration typing a username / password

- 3.4.23. Registered users can log-in (email address or username / password) to access their account settings page where they can change their password, opt in/out to receive e-mail newsletters; edit/change some personal data (First Name, Last Name), and delete their account-.
- 3.4.24. When user is logged in, web portal displays welcome user name message and offers link to My account settings page
- 3.4.25. User registration process has "remember me" and "forgot your password" functionality
- 3.4.26. A registered user can select the default preferred first, second and third languages. If a content item does not exist in the default language, the system will display the item in the next language option.
- 3.4.27. *Email Alerts*
- 3.4.28. Registered users should be able to setup personal alerts to receive notification when "key events" occur
- 3.4.29. "Key events" which trigger alerts can include: new content items or changes to existing content items
- 3.4.30. The alerts should be delivered via email and should either contain the full content item in the body of the email message or display some metadata and offer a link to the content item
- 3.4.31. User can subscribe/unsubscribe/view archives of targeted email newsletters. Targeted email newsletters aggregate content items.

3.4.32. *Feedback –contact us*

User can easily send feedback or query to Cedefop (i.e. Contact us form).

### **3.5. Technical Characteristics**

3.5.1. *Multilingualism - Translations*

3.5.2. Full multi-language support: including concurrent viewing of content in multiple languages; and UTF-8 character set for content items (incl. search, navigation etc.)

3.5.3. Leveraged template model supporting multi-language sites (rather than building sites for each language) and version of content object in other language (rather than different object for each language).

3.5.4. *CMS Library Services*

3.5.5. A document that is checked-in, should be "published" and ready for retrieval by other users immediately

3.5.6. Only one Content Manager or Content Editor has access to a specific content Item at any given point in time (check-out).

### *3.5.7. Workflow support*

Provide adequate support for content contribution WCM workflows (moving components through a pre-defined cycle of creation, revision, approval and deployment). A workflow process can be initiated by a human, an event or by other triggers, such as the passage of time.

### *3.5.8. Web-based WCM interface*

Web/browser interface is available to all WCM functions while connected to the network directly or remotely.

### *3.5.9. Content expiration*

WCM supports expiration dates for individual content items.

### *3.5.10. Standards compliance*

3.5.11. Adherence to standards of HTML 4.01 and/or XHTML 1.0, CSS 2.1, and general adherence to W3C and DCMI standards latest version, where applicable and possible

3.5.12. Comply with level A Web Content Accessibility Guidelines 1.0 / Section 508

3.5.13. The webpages must be viewable in all major web browsers (IE6&7, Firefox, Opera, Safari, Netscape).

### *3.5.14. Architecture*

Provide a clean and open architecture. The system must be migration-friendly and provide ability for integration and interoperability with 'other' technologies, through open standards.

### *3.5.15. Security*

All e-mail addresses appearing in the web site should be appropriately encoded (e.g. with javascript) so as to protect them from spam.

### *3.5.16. CMS audit trail*

Audit trail of the authoring workflow for each content object should exist, along with a version history of the content.

## **3.6. Reporting and Statistics**

It should be ensured that reporting and statistics data (see section 4.1) are properly being recorded and any mechanism needed for this should be implemented in the first deliverable. The actual graphical and table reports can be implemented at the 2<sup>nd</sup> deliverable.

## 4. 2<sup>ND</sup> DELIVERABLE (MILESTONE 2)

### 4.1. Reporting and Statistics

Reports for statistics and usage could be produced in HTML, PDF, etc. and may contain graphs / diagrams as well as tables.

#### 4.1.1. CMS reporting

4.1.2. Reports and Statistics on any content piece of any “type” within the repository and on CMS-related transactions (status, history of content - actions on content / by date, topic, author) e.g. number of contributions by content manager X; or how many news items created in January; how many times a particular page has changed, etc. (see “content types” of items in section 2.2 above)

4.1.3. Reports on completed language versions of content items, as well as status information of language versions in progress or missing language versions, e.g. how many documents have only English version?

4.1.4. Reports of Archived/Retired - Report of documents and any content types nearing a threshold of an aging date and are ready for archival

4.1.5. Report on content items missing required metadata.

#### 4.1.6. Delivery reporting

4.1.7. Web Portal will use WebTrends for most web site traffic and web usage statistics. The web portal will need to ensure that it provides what WebTrends needs in order to output the statistics

4.1.8. Web site traffic and web usage statistics and reports should be available both globally and per web site section/theme/activity.

#### 4.1.9. Interfacing with third-party tools and exporting

Ability to export reporting data to Excel by some other means than copy/paste.

### 4.2. Search

Provide basic and advanced search functionalities.

#### 4.2.1. Basic Search

Basic Search and retrieval of content items and document based on their metadata, and/or full text.

#### 4.2.2. Advanced search

- 4.2.3. Ability to search with criteria / search fields specific to the different sections or “content types” (e.g. Activities, Networks, News, Events, Conferences, Institutions, Contact persons, Documents, Contracts, and FAQs)
- 4.2.4. Ability to search using keywords of a controlled vocabulary (see section 2.3.4)
- 4.2.5. User can combine search criteria with Boolean operators.
- 4.2.6. *A-Z site index*
- 4.2.7. Provide an A-Z site browsing index of all content items and sections, sorted by their name (e.g. A: About Cedefop M: Mission of Cedefop, L: List of staff).
- 4.2.8. *Search features*
- 4.2.9. System highlights search terms in search results display
- 4.2.10. User can see that a content item or document exists in other languages and can access / download other language versions easily
- 4.2.11. For each search result, user can see information such as relevancy, ranking and date
- 4.2.12. Content items added to the search index are indexed quickly so that they can show up in search results
- 4.2.13. Users shall only obtain in their search results content they are authorised to access
- 4.2.14. User can refine search by filtering search results (facets)
- 4.2.15. User can search the full web portal or limit search to a distinct section of the Cedefop web portal
- 4.2.16. Administrators can modify, adjust or influence the ranking algorithm in order to improve relevancy.

### **4.3. Library Services**

Provide version control. User can access previous versions of content items (after they have been updated or changed) and can revert back to them. User can check-in, check-out content items. System keeps control of versions.

#### **4.4. Other features / projects**

##### *4.4.1. Link live site with CMS*

When users are logged-in on the website, and they are Cedefop staff, they are presented with a special link in each page, which when clicked, redirects them to the corresponding page to be edited at the RedDot CMS.

##### *4.4.2. Registered users recently visited sections*

Home page personalized to show the list of recently visited sections or content and list of most recent searches.

##### *4.4.3. RSS Feeds*

Users can select ATOM / RSS feeds from a pre-defined list and add them to their lists (like News, new downloads, new content added etc.).

##### *4.4.4. Online polls / surveys*

User can participate in online polls (including real time display of results).