

THE PENNSYLVANIA STATE UNIVERSITY

University Park, PA

Request for Proposal

RFP #4468-B

**Web Content Management System for
the Penn State University Libraries**

Release of RFP: 05/17/2005

Proposal Response Due Date: 4:00 p.m. on 06/03/2005

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1 Project Overview and Administrative Information

1.1 Overview

The Pennsylvania State University, through this Request for Proposal (RFP), is seeking a Web Content Management System (CMS) for the Penn State University Libraries system located at various campuses.

The Pennsylvania State University was established in 1855 and continues as a state-related institution of higher education in the Commonwealth of Pennsylvania with its primary campus, University Park, located in State College, Pennsylvania. It is a major research institution currently enrolling approximately 83,000 students in a broad range of academic programs. Courses are offered throughout the year during a Fall semester, a Spring semester, and multiple Summer sessions.

1.2 Proposal Instructions

1.2.1 Address Instructions

Suppliers should prepare an original written proposal and five (5) copies signed by an officer of the company who is authorized to bind the company by contract. Such proposals should be submitted in a sealed envelope marked Web Content Management System for the Penn State University Libraries Proposal, RFP #4468-B, and addressed to the following:

The Pennsylvania State University
Purchasing Services
Attn: Meg Harpster
101 Procurement Services Building
University Park, PA 16802-1004

1.2.2 Delivery

Proposals must be received by mail or hand delivered to the above address no later than 4:00 p.m. on Friday, June 3, 2005. FAX transmissions are not acceptable. Proposals submitted or received after that date will not be accepted or considered. Bidders may submit changes or addenda to their bid in writing, signed in original ink by the original proposal signatory, and cross referenced clearly to the relevant proposal section, in a sealed envelope, prior to the proposal due date. Such changes/addenda must meet all requirements for the proposal. No changes or withdrawals are permitted after the proposal due date.

1.2.3 Proposal Format

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Supplier's ability to meet requirements of the RFP. Sections

must be tabbed and pages numbered and in the same sequence as the specifications requested. If a specification is not applicable, or if there is no response, so state.

1.2.4 Decisions Regarding Proposals

Penn State reserves the right to:

- Make all decisions regarding this proposal, including, without limitation, the right to decide whether a proposal does or does not substantially comply with the requirements of this Request for Proposal;
- Accept, reject, or negotiate modifications in any terms of bidders' proposals or any parts thereof;
- Reject any or all proposals received.

The University shall not be responsible for any cost incurred by the Supplier in the preparation of this proposal. It must be specifically understood that this Request for Proposal does not create any obligation on the part of The Pennsylvania State University to enter into any contract or undertake any financial obligation with respect to the program referred to herein. Any supplier who expends time or money prior to award does so at the supplier's own risk and expense. The Supplier understands that, if selected, Penn State reserves the right to provide its opinion publicly and privately regarding the Supplier's performance.

1.2.5 Bidder Inquiries

No negotiations, decisions, or actions shall be executed by any Supplier as a result of any oral discussions with any University employee. Only those transactions that are in writing shall be considered valid. Email inquiries are acceptable, meb155@psu.edu. Likewise, the University shall only consider communications from bidders that are in writing or e-mailed. **All inquiries related to this RFP must be received no later than TUESDAY, MAY 31, 2005 in order to allow ample time for a response.** Inquiries concerning this Request for Proposal shall be submitted to:

The Pennsylvania State University
Purchasing Services
Meg Harpster
101 Procurement Services Bldg.
University Park, PA 16802-1004
Or e-mail to meb155@psu.edu

Answers to a Supplier's inquiry will be made available at the website <http://www.libraries.psu.edu/committees/CMS/>. Notification of updates to the site will be in writing to all bidders via email.

1.2.6 Supplier Presentations

Part of the bid/proposal evaluation process shall include a formal presentation from selected highest-ranking bidder(s). If invited, Suppliers should use this presentation to provide evaluators with further insight regarding their proposal and to clarify any issues. The presentation will be open to all Libraries faculty and staff. Suppliers are welcome to

make the presentation in person at the Pattee Library, but other means will be considered as long as they don't prevent any of our faculty or staff from participating and don't require undue effort or expense on our part. The Libraries reserves the right to reject any alternative presentation method. It is strongly recommended that the presentation include a sample of our existing site migrated into the system and that the business objectives stated in this RFP be clearly addressed.

1.2.7 Review Criteria

The University will review all accepted proposals with particular emphasis on:

1. Supplier's record of performance and service in higher education.
2. Supplier's conformance to RFP's specifications, requirements, terms, conditions, and provisions.
3. Extent of Supplier's experience, stability, supporting resources, and management.
4. Supplier's overall financial package.
5. Cost of products to be purchased by the University.
6. Innovative offering and solutions to further enhance the partnership.
7. Supplier's financial stability. Evidence of financial ability to meet operational requirements. Include a bank reference for your organization. Include audited financial reports for the past three (3) years. Please do not bind these documents with the main portion of your proposal. Supplier must include these documents in the prepared proposal package.

1.2.8 Estimated Time Table

Issue RFP	May 17, 2005
RFP Submittal	June 3, 2005
Proposal Examination	June 6-10, 2005
Supplier Presentations	July 5-15, 2005
Supplier Selection	July 29, 2005

1.2.9 Proposal Validity

Proposals should be considered valid for at least 180 days from the proposal submission deadline.

1.2.10 Proprietary Information

Information provided in your response to this RFP will be held in confidence and will not be revealed and discussed with competitors. All material submitted becomes the property of the University and may be returned only at the University's option. Proposals submitted become the property of the University and may be reviewed and evaluated by any person except for competitors at the discretion of the University, regardless of statements contained within the Supplier's response to the contrary. The University has the right to use any or all concepts presented in any reply to the RFP. Selection or rejection of the proposal does not affect this right.

Information provided by the University to the requesting Supplier for the purpose of providing a response to the RFP is the property of the University. As such, said

information is to be kept in confidence and used only for the intended use of this RFP. This RFP shall not be distributed to others without the University's permission.

1.3 *Penn State Information*

1.3.1 Overview of The Pennsylvania State University

On February 22, 1855, Governor James Pollock signed the charter incorporating the institution that would become Penn State. He could not have foreseen that he was creating what would become one of America's largest and most distinguished universities.

Penn State derives much of its public character from its obligation as the Commonwealth's land-grant institution. In return for carrying out its land-grant mission, the university receives regular appropriations from the State Legislature. Because the Commonwealth uses and supports it as an instrument for the public good, Penn State is for most practical purposes a public university. It should be noted however, that the University is privately chartered and governed by a Board of Trustees selected under that charter and later amendments.

Penn State ranks among America's ten largest universities in enrollment. In 2003, it had approximately 83,000 full-time and part-time students. Of the total student population, 50 percent enrolled at University Park.

Penn State's University Park campus, located in State College, is the administrative hub of the institution. It is the primary site for graduate study and enrolls more than half of all Penn State undergraduates.

The following twelve academic units confer degrees at University Park:

1. The College of Agricultural Sciences
2. The College of Arts and Architecture
3. The Mary Jean and Frank P. Smeal College of Business Administration
4. The College of Communications
5. The College of Earth and Mineral Sciences
6. The College of Education
7. The College of Engineering
8. The College of Health and Human Development
9. The College of the Liberal Arts
10. The Eberly College of Science
11. Graduate School
12. School of Information Sciences and Technology

For additional information visit our web site at the following internet address:
www.psu.edu.

1.4 General Terms and Conditions

1.4.1 Mandatory Requirements

1.4.1.1 Contract Law

Any contract resulting from this RFP will be subject to the laws of the Commonwealth of Pennsylvania. The total contract shall include this Request For Proposal, the Supplier's proposal, and the negotiated and executed contract.

1.4.1.2 Contract Assignment

No portion of any resulting contract may be sublet, sub-contracted, or otherwise assigned by the Supplier without the prior written consent of the University.

1.4.1.3 Indemnification

The successful Supplier shall agree to indemnify the University against any loss or damage (including reasonable attorney's fees and other costs of litigation) caused by the successful Supplier's negligent acts or omissions or the negligent acts or omissions of the successful Supplier's agents or employees. The successful Supplier shall agree to defend any suit against the University alleging injuries or damages arising out of the use of the material, goods, or services provided, however, that nothing contained herein shall require the successful Supplier to defend or indemnify the University for injuries or damages arising out of the negligence of the University, its agents, or employees.

1.4.1.4 Contract Changes

During the period of the contract, no changes will be permitted in any of the conditions and specifications unless the Supplier receives written approval through Penn State Purchasing Services.

1.4.1.5 Permits, Licenses, Taxes and Certificate of Authority

The Supplier shall procure all necessary permits and licenses and abide by all applicable laws, regulations, and ordinances of all federal, state, and local governments under which the contract will be performed.

The Supplier shall be responsible for any and all taxes and assessments arising out of the operation, by not limited to, payroll and personal property taxes, franchise taxes, sales and use taxes, and income taxes.

1.4.1.6 Insurance Requirements

The Supplier shall provide Commercial General Liability Insurance in the minimum amount of \$5,000,000 per occurrence, including Product/Completed Operations, and Automobile Liability in the minimum amount of \$1,000,000 Combined Single Limit per occurrence. All insurances are to be written on an occurrence basis with The Pennsylvania State University named as an Additional Insured.

The Supplier shall provide Statutory Worker's Compensation and Employers' Liability in the minimum amount of \$500,000.

Prior to the signing of the contract and upon each insurance renewal thereafter, the Supplier shall provide a Certificate of Insurance evidencing the required coverages and providing for thirty (30) days' notice of cancellation or material change in coverage.

1.5 Background and Objectives

1.5.1 Background

Currently the Libraries has about 100 people contributing to our web presence of 40-50K static pages, with a majority of those people using tools such as Dreamweaver or a plain text editor. Skill levels of our contributors range from novice to experienced, with the majority being towards the novice end of the spectrum. There are also people who are not skilled enough with web technology to contribute directly. If we achieve our objectives in implementing this system, we expect the number of contributors to grow anywhere from 50 to 100 percent. We also have various web applications that are not included in this information and are not part of this RFP.

Currently there is not a centralized, formal workflow. While there are central resources and standards both at the University level and the Libraries level, individual units establish their own workflow and approval process.

We plan to implement a full redesign of our static website when we implement the CMS acquired through this RFP. Various discussions and studies are currently taking place to permit this redesign to happen in accordance with the schedule set forth in this RFP.

1.5.2 Objectives

This Request for Proposal is for the purpose of soliciting contract proposals for providing a web content management system. The selected Supplier will be expected to enter into a written contract with the University which will include the terms of the RFP.

The main business objectives we expect to achieve by implementing this CMS are:

1. User friendliness for contributors – One of the main goals of the CMS is to make it easy for people with varying degrees of technical skills at the Libraries to be able to contribute content to our website. To facilitate this, we believe the CMS needs to be very user friendly for contributors.
2. Localization – For our purposes, this is meant as the ability to provide specific content based on an individual's geographical location or association in order to address the different needs of people at the campuses, especially for those at Hershey, Dickinson, and the World Campus. Multilingual capabilities, while desirable, are not considered a major requirement at this time.
3. Standards compliance and enforcement – This is the ability of the product to produce Web pages which are consistently compliant with W3C and Section 508 standards. A major aspect of this includes preventing contributors from adding content which would invalidate these standards.

Secondary business objectives we expect to achieve by implementing this CMS are:

4. Direct access to data – For various reasons, we want the ability to get our data out of any system that we put it into. This is primarily for forward migration purposes, but has other advantages.
5. Metadata (Qualified Dublin Core support, minimum) – Metadata management is viewed as critical to the success of our system and, based on the recommendation of the Metadata Task Force, the ability to implement and manage the Qualified Dublin Core metadata standard as a minimum.
6. Ability to present content in more than one way – An initial finding of the Working on the Web committee was that we wanted to be able to present our content using more than one organizational method. A product that can do this based on metadata would be ideal.
7. Interface with other applications (Via RSS or other) – A CMS which can both consume information from and provide information to other applications, such as ANGEL (course management system), the Penn State Portal, other websites, and even SFX and Metalib (journal management systems), we believe is an important feature.
8. Support – Because the Web is becoming our main point of service to our customers, having the content and the CMS up and running is extremely important. In the baked methodology, static pages are published either after completing the last step of a workflow or on a regular schedule. Because these pages would still be available if the CMS itself was down, a longer turn around time is acceptable. In the fried methodology, pages are generated dynamically as patrons request them. Because of this, when the CMS is down, our site is down. This would be a major service problem, so more robust support is required.

1.5.3 General Requirements

1.5.3.1 Contract Cancellation

The University agrees to not arbitrarily cancel the executed contract. Contract cancellation by the University may occur for due cause including, but not limited to non-conformance and non-compliance with contract terms or conditions.

Proposal Response Required

Sections two (2) and three (3) are divided into components that require a detailed response from the Supplier. Responses must be formatted and numbered to coincide with the RFP. The proposed solution should only contain items which are currently in production and in use by existing customers.

2 Technical Requirements

2.1 System Requirements

For this section, please state whether or not your proposed system meets each requirement. If you wish, you may expand upon your answers to include areas beyond the requirement for which your system has additional capabilities.

2.1.1 Server

For this section, please also indicate other relevant software/systems that your proposed system is compatible with and the preferred version/system, if any.

1. Solaris 9 or 10
2. Apache 1 or 2
3. Oracle 9i or 10g, MySQL 4+, PostgreSQL, or file system
4. Hosted solutions are not acceptable
5. System must be compatible with a redundant architecture, with Web pages being served from at least two different machines. Please state which method(s) of redundancy your system supports, which one is preferred, and be sure to include any actual or potential additional costs of this redundant architecture in the costs section.

2.1.2 Authentication/authorization

1. The proposed system must be able to work with an independent authentication system and provide authorization based solely on a validated userID without requiring a password to be passed. The proposed system could pass several parameters to the authentication system, such as a return URL, and the authentication system would pass back a validated userID and any other required parameters, except the user's password. The system currently in use is the Penn State WebAccess system. More information about this single sign-on system can be found at <https://webaccess.psu.edu/help.html>.
2. Authorization would be handled by the CMS.

2.1.3 Contributors

1. Content contribution and editing is to be done using a Web browser. Systems requiring the installation of a thick client are not acceptable.
2. Content contributors must be able to use any of the following browsers without significant loss of functionality:
 - a. Internet Explorer 5.5 or higher
 - b. Netscape 7.0 or higher
 - c. Firefox 1.0 or higher
 - d. Safari 1.1 or higher
3. Content contributors must be able to use any of the following operating systems without significant loss of functionality:
 - a. Microsoft Windows 2000 or higher
 - b. Apple OS X 10.0 or higher

2.1.4 Standards

System must be able to publish content adhering to the following standards, assuming the templates we create adhere to those standards. The system must also be able to enforce these standards with respect to contributed content.

1. W3C standards for (X)HTML and CSS
2. U.S. Section 508 standards for accessibility

2.1.5 Metadata

System must be capable of defining, implementing, managing, and publishing content metadata that conforms to the Qualified Dublin Core Metadata standard (<http://dublincore.org/>), including the ability for the metadata administrator to establish predefined vocabularies and various element restrictions.

2.1.6 Workflow

The University Libraries consists of many units and many campuses, each responsible for their own web workflow. As such, rather than having all workflow and permissions administration managed centrally, the proposed system must permit the delegation of workflow and permissions administration to each unit.

So while there will be central administration to some degree, an individual in each unit will be given permission to establish and manage the workflow within their unit and establish, modify, and rescind permissions for each individual in their unit. It is anticipated that any given unit would have a workflow from one to four levels.

2.2 *Collecting Content*

2.2.1 Acquisition

2.2.1.1 What formats of aggregated content is the proposed system capable of consuming and how are these feeds established?

2.2.1.2 What metadata is generated for consumed, aggregated content feeds, either from metadata provided with the feed or automatically generated from the content?

2.2.1.3 What tools are available in the proposed system for importing existing content?

2.2.2 Authoring

2.2.2.1 What tools do content creators have the option of using to create content for the system? Please be descriptive and include both native (WYSIWYG, form-based, etc.) and non-native (Word, Dreamweaver, text editor, etc.) options.

2.2.2.2 Does your system provide a spell checker for contributors? If so, please describe it, including any pertinent features such as custom dictionaries.

2.2.2.3 What options does your system have to allow contributors to preview pages?

2.2.2.4 What tools are provided for contributors to find and utilize other content, including text, images, sound, video, and documents?

2.2.2.5 To what extent can the authoring interface be customized, including the administrative restriction of text formatting options?

2.2.2.6 How are templates created for use in your system and what skills are required to create them?

2.2.2.7 How do contributors apply metadata and what metadata can be auto generated?

2.2.2.8 Are administrative, technical, and content metadata readily available and able to be delineated?

2.2.2.9 Does the proposed system provide a metadata thesaurus? If so, please describe its capabilities and use.

2.2.2.10 What types of assistance are available to contributors and to what extent can they be customized? This would include such things as online documentation, context sensitive help, and examples.

2.2.2.11 What types of workflow messaging and feedback does the proposed solution provide?

2.2.2.12 To what extent does the system permit the creation and customization of workflow tasks, roles, and groups and what limitations does it place on these activities?

2.2.2.13 Does the contributor interface provide multilingual capabilities? If so, which languages are provided?

2.2.3 Versioning

2.2.3.1 What features does the system have with respect to content release scheduling, expiration, and archiving?

2.2.3.2 What does the system provide with respect to time/date stamping of content and templates?

2.2.3.3 How does the system handle rollbacks/versioning of content, pages, and templates and how many revisions of each?

2.3 *Managing Content*

2.3.1 Data Storage and Backup

2.3.1.1 How is data stored (database, file system, etc.)?

2.3.1.2 Is the data directly accessible by us for use either in other applications or in forward migration? If so, how?

2.3.1.3 Is the format of the data storage provided, such as in a database schema or by other means?

2.3.1.4 What data, configuration, and customization backup and disaster recovery methods are provided and/or recommended?

2.3.2 Metadata Management

2.3.2.1 How does the system determine which metadata is published with the page or syndicated feed and which metadata is strictly for use within the CMS?

2.3.2.2 Is the metadata accessible from outside of the system? If so, how?

2.3.2.3 If a published page consists of several content objects, how does the system merge the metadata from those objects to provide appropriate metadata for the overall page?

2.3.3 Editing and Misc.

- 2.3.3.1 How does the proposed system deal with multiple people attempting to edit the same file?**
- 2.3.3.2 What types of merging or difference tools does the system provide?**
- 2.3.3.3 What types of reporting does the system provide, including workflow, system performance, and user interaction?**
- 2.3.3.4 Does the system provide for the creation and maintenance of hierarchies, taxonomies, indices, or cross references? If so, please describe.**

2.4 Publishing Content

- 2.4.1 What types of personalization does the proposed system provide and how is this managed?**
- 2.4.2 Does your system provide for multilingual publishing capabilities? If so, please describe how translation is managed and incorporated into the workflow and how users select which language they see.**
- 2.4.3 What types of platforms, other than standard Web browsers, can the system publish to and how is this accomplished? This might include print, cell phones, PDAs, text-only, or others.**
- 2.4.4 What types of URLs does the system produce? Are they human-readable? Are they search engine friendly? Are they or can they be made permanent? Can temporary redirects be created?**
- 2.4.5 Can the system publish syndicated content via RSS or Web Services and, if so, how is this accomplished?**
- 2.4.6 Does the system have any known problems, limitations, or special capabilities when dealing with external search engines, either public ones or internally installed ones?**

3 Management Requirements

3.1 Delivery and Installation

- 3.1.1 How is/are the proposed product(s) delivered?**
- 3.1.2 Please explain the installation and testing process, including who is responsible for each aspect.**
- 3.1.3 How long do you anticipate installation would take?**

3.1.4 What preparation is required on our part prior to installation?

3.1.5 Once the sale is complete, would a single project contact be assigned to work with us throughout the process? If not, what model do you recommend?

3.2 *System Maintenance and Support*

3.2.1 When product upgrades are installed, what is the typical downtime experienced by the contributors? By the end users?

3.2.2 How frequent are both major and minor software updates? Are there prerelease notes for both?

3.2.3 If the product experiences an outage, do the end users still have full access to the web pages?

3.2.4 What steps have or can be taken to minimize system downtime?

3.2.5 What are the support options? Pricing for these options should be covered in detail in the pricing section.

3.2.6 This will be a mission critical system for us that is expected to be available 24/7. How will your proposed solution provide us with a reliable system and what assurance can you provide that any system failures will be recovered from quickly and with minimal or no loss of data?

3.2.7 What levels and types of staffing do you recommend for a typical organization of our size and complexity on an ongoing basis?

3.3 *Training*

3.3.1 What training program do you include and/or recommend for your proposed solution? Detailed pricing for training should be included in the pricing section.

3.3.2 Do you provide a train the trainer option for either contributors or administrators?

3.3.3 What options are available for training locations?

3.3.4 If training at our location is an option, what are the requirements, such as hardware, software, audio/visual, facilities, etc.?

3.4 *Documentation*

- 3.4.1 In what form is documentation provided for the product? Please include any costs associated with documentation or documentation updates in the pricing section.**
- 3.4.2 How often is this documentation updated?**
- 3.4.3 Are there any limitations on distribution of the documentation within our organization?**
- 3.4.4 If we have access to the source code, to what extent or what standards is the code commented?**

3.5 Product Improvement and Extensibility

- 3.5.1 Describe the process you have established for your customers to influence product development.**
- 3.5.2 If we have a business need for a change in the product that you can't or won't make, what options are there for us to address this need?**
- 3.5.3 If customization of the product by us is an option, what precautions do you take to make sure future releases of your product don't overwrite our customizations?**
- 3.5.4 Is the source code for the product included with the specified price? If not, how much would this option cost, if available?**
- 3.5.5 What programming languages, scripting languages, or other technical skills are needed to extend, enhance, or customize the product(s)?**
- 3.5.6 Does the proposed solution include any proprietary software or other aspects that are not owned or produced by the Supplier listed in Section 4?**

3.6 Product Accessibility and Usability

- 3.6.1 To what extent is your product U.S. Section 508 compliant for contributors and administrators?**
- 3.6.2 What type, if any, usability testing do you perform on your product interfaces for contributors and administrators? If available, please include any test results/reports.**
- 3.6.3 Prior to final selection, we require the ability to perform our own usability testing of the contributor interface of the product(s) proposed by selected highest-ranking bidder(s). What method(s) would you provide us with to perform this testing?**

3.7 Campus Perspective

The University Libraries has many units across many buildings located on many campuses throughout the state and must serve the needs of patrons around the world. Because of this, the Libraries has particular needs with regard to a CMS solution. Please address the following items from that perspective.

3.7.1 Templates

We will need to provide approximately 50 different templates for editors to use, although most will only use the one appropriate for their location. How does your system provide for the management, access restriction, and updating of these templates and is there a limit on the number of templates the system can effectively handle?

3.7.2 Administration Delegation

Administrative tasks, especially regarding workflow and user administration and authorization, will need to be delegated to each unit in the organization, with each unit having the ability to establish its own workflow. Does your system allow for this, and if so, how is it handled and what are the limitations?

3.7.3 Localization

We need to provide users with content specific to their location. Currently their location can be determined to some extent by their IP address and/or LDAP entry and at some point in the future by a more precise version of LDAP and/or Shibboleth (<http://shibboleth.internet2.edu/>). How would your system provide localized content like this using the stated systems?

4 Supplier Qualifications and References

4.1 *Company Information*

- 4.1.1 Full legal company name, address, and primary contact for this RFP**
- 4.1.2 Company website**
- 4.1.3 Year business started**
- 4.1.4 Country and state/province of incorporation**
- 4.1.5 Tax identification number**
- 4.1.6 Brief company history**
- 4.1.7 Does another company own you? If so, provide the corporate structure.**
- 4.1.8 Location of company headquarters. If outside of the United States, also include the location of your main office in the United States, if applicable.**
- 4.1.9 Are you a public or private corporation?**
- 4.1.10 Stock symbol, if applicable**
- 4.1.11 Is your company currently involved in any litigation in which an adverse decision might result in a material change in the company's financial position or future viability?**
- 4.1.12 Evidence of financial ability to meet operational requirements. Include a bank reference for your organization. Include audited financial reports for the past three (3) years. Please do not bind these documents with the main portion of your proposal. Supplier must include these documents in the prepared proposal package.**
- 4.1.13 Indicate the project/account manager that would be assigned to Penn State if your company was awarded a contract. Provide background information on this person (resume, experience with similar projects, etc).**

4.2 *Customer Base and User Groups*

4.2.1 Total number of customers using the product(s) being proposed for this RFP

4.2.2 Please provide information about any user groups either sponsored by your company or independent that are based on the product(s) being proposed for this RFP. Please include locations, websites, and other relevant information.

4.3 *Business and Market Focus*

4.3.1 What percentage of your revenue comes from the product(s) being proposed for this RFP?

4.3.2 In which national or international standards committees or consortiums do you participate?

4.3.3 How many times and when have you updated your software in the past year?

4.4 *References*

4.4.1 Please provide references for three of your customers who have similar needs to us, including their company URL, the URL of the site produced by your system, if different, and the name and contact information for someone whom we can talk to there.

4.4.2 Is the website of your company currently being published by the most recent version of your product? If not, why not?

5 Suppliers' Section

6 Pricing Section

Describe all fees associated with your service offering as it pertains to meeting the requirements of the RFP specifications outlined.

Do your fees include all out of pocket expenses you might incur during this implementation?

7 License Agreements

8 Glossary¹

¹ Many of the definitions in this glossary are from CMS Glossary, <http://www.cmsglossary.com/>.

Accessibility - Accessibility is the measure of a web page's usability by persons with one or more disabilities, hearing- or visual-impairment being the most important.

Aggregation - Aggregation describes the collection of assets in the first phase of a Content Management System. Aggregation also describes the receiving (or consuming) of RSS or RDF feeds (news feeds or data feeds) by a CMS. The producer of the feeds is called a syndicator.

API - Application Programming Interface.

Authentication - Authentication works hand in hand with Authorization to provide access control. Authentication insures that the current user is who he/she claims to be, challenging for a user name and password.

Authorization - Authorization follows secure authentication of the user's identity. It determines how trusted the user is and establishes the resources the user will be allowed to access.

Baked - Baked is a term of Content Management jargon that describes pages that have been generated by a CMS, perhaps even generated dynamically, but then moved to a static delivery server, which can serve them at high speed and high volume.

A baked or static page cannot contain the kind of personalization required for Customer Relationship Management and other interactive services, however some sites use a CMS to publish baked pages that actually contain server-side code, such as ASP, JSP or simple SSIs, which are then parsed on the server to provide dynamic services such as personalization.

Breadcrumbs - The term comes from Hansel and Gretel, who left a trail of breadcrumbs to find their way home. Breadcrumbs indicate a web page's location within the structure of the website. They work best for sites with a strong hierarchical structure.

CMS – Content Management System.

Content Management System - Broadly speaking, a content management system describes application software that allows people to more easily change and update content, especially on their websites (WCM). When the content (number of pages, images, etc.), and/or the number of contributors, grows large, a CMS helps collect, create, and aggregate content in ways that makes it easy to reuse.

Fried - Fried is a term of Content Management jargon that describes web pages dynamically generated by a CMS. Fried pages must be served from the main Content Management Application Server. This means they are slower to serve than static or baked pages.

But they then have the full power of personalization, localization, and Multi Channel delivery made possible by dynamic pages.

Localization – Publishing content translated into a user's local format, such as language or currency. See also item 2 in Appendix A.

Multi Channel - Multichannel Publishing means different versions of the content can be formatted for delivery in different physical "channels" like the web (HTML and PDF), traditional print, wireless handheld devices, and cell phones.

But another way to look at "channels" are different audiences or types of users which require a difference in the content, or perhaps only the presentation.

Personalization - Personalization may be genuine One To One Marketing in which the CMS keeps track of the individual. Amazon currently has the most powerful personalization on the web. It uses every past purchase, and products browsed, to form a pattern on which to base purchase recommendations.

Less powerful personalization systems aggregate visitors by shared properties, tailoring the content delivery to broad categories. These categories are sometimes called channels, requiring different content, or perhaps only different presentation of the content.

Personalization of pages requires that Delivery be from dynamic servers.

Sandbox - A sandbox is a special area where developers can play with a software tool, usually with full administration privileges.

Single Sign-on Authentication – A service in which users authenticate/login once to a central server in order to access multiple services without needing to re-authenticate.

Syndication – Making content available to be embedded in other's web pages.

Thick client – Software installed on a computer that generally only interacts with one particular server system. For the purposes of this RFP, this would be anything but a web browser as indicated in the requirements section.

WebAccess – Penn State's Single Sign-On solution for access to web-based services.

Workflow – A system for routing documents (or pages) between users responsible for working on them. This is often used to implement a review and sign-off process for new or updated content.

WYSIWYG - WYSIWYG is an acronym for What You See Is What You Get.