

Section 1: General/IT Infrastructure

In this section, you will detail your general IT infrastructure requirements for a content management system. As you consider these requirements, keep in mind enterprise-wide requirements: Has your company adopted a single operating system? A single database backend? For example, a content management system may depend on the presence of a relational database; your company may already have a core competency in Oracle, or Sybase. They may also be able to leverage past buying to obtain better discounts, and so forth. Finally, this section will help identify potential stumbling blocks for a new system.

1. Do you have a preferred or required *operating system* in use at your organization? What version(s) are you currently running? Are there plans in place for an upgrade or transition path to a new operating system? Detail any unique requirements that you are aware of.
2. Do you have a preferred or required *database* in use at your organization? What version(s) are you currently running? What applications are in use with the database? Are there plans in place for an upgrade or transition path to a new database system? Detail any unique requirements that you are aware of.
3. What *email system* is in use at your organization? Is it integrated with a document management system? What version are you currently running? Are there plans in place for an upgrade or transition path to a new system?
4. Are you currently using any *other content management* or *document management* application? What version? Characterize the installation in terms of number of users, number of documents or size of the database, period of time in use.

5. Detail your requirements *for remote usage*. Are all potential users within a single LAN or WAN? Will they require dial-up access?

6. Does your IT organization favor *certain programming models*, or do they have a *core competency* that you would want to exploit for this project? For example, are they proficient in Visual Basic applications, Microsoft Active Server Pages, and so forth?

7. Does your document workflow require *long-term archival storage* of media, or the need for maintaining “official” copies of document versions over long periods of time?

8. Does your organization have preferred methods for *backup and recovery* (including disaster recovery) that your content management application will need to integrate with? For example, many organizations are moving to high-speed backup devices that work across multiple servers.

9. Does the nature of your publishing require delivery of certain *industry-specific data types*? For example, do you produce regulatory filings that need to be delivered on certain media, in precise file formats, and so forth? Do you share document data with other organizations, even other divisions of a large organization?

10. Have you considered reasonable *performance* requirements for typical tasks? Are your current systems performing adequately and have you quantified performance measures? Are you prepared to accept slower operation from a system that is embedding significant new processing tasks? Or would you invest in hardware upgrades, software upgrades, and performance analysis and tuning to match or exceed current performance?

11. Have you considered issues of *maintainability and reliability*? Do you run more than one shift, or do you have periodic needs for continuous operation? Are you prepared to operate a system that requires significant maintenance and support time, or would you require very simple administrative functions?

12. Do you anticipate the need to *extend* the system? For example, do you anticipate producing only one type of documentation in the early life of the system and then moving to other document types? Do you see new publishing requirements emerging that would require extending the system further?

13. Does the system need to *scale* over time? Do you anticipate adding users either through growth or acquisition? How large could the system grow in terms of users, size of the data, complexity of operations?

Section 2: Content Creation and Management

In this section you will detail your requirements for creating and managing content. The focus here is on editorial process and workflow. How is your work currently done, and how can it best be done? How is content created, edited, and reviewed? What are the many types of material you have to deal with, from text types to other data types? What tools are brought to the process, and what additional tools would you like to use?

Section 2.1: Authoring

1. Do you have a preferred or required *authoring tool* or tools that you currently use? Do you consider continued use of this product a requirement? What version are you currently using? Do you have plans for upgrading? Do you use a shrink-wrapped version of the product or has it been customized for your use? If it has been customized, how extensive is the customization?
2. Do you have a need to *edit many text file formats*, including SGML or XML, relational data, HTML, Help? (In this section, focus on data that you have to edit in source form as opposed to deliver through some kind of transformation process.) Detail these requirements, and list the tools you are currently using.
3. Do you regularly use and require support for editing *other file formats* including graphics? Detail these requirements, and list the tools you are currently using.
4. Do you have *extensive tables* in your documentation? Do they have any unique formatting requirements that are difficult to achieve?

5. In addition to the content itself that you create, do you have a requirement to *create and update metadata*? Examples would include classification or categorization data, workflow-related data, and specialized information such as product information (part numbers, logistics data, etc.). Detail these requirements and how they are currently handled.

6. Is your documentation currently *translated* into other languages? Is Help and other contextual information localized? Discuss how this is currently achieved and how you expect this to be supported in your content management system.

7. Detail how *indexing* is handled in your current operation. Are distinct indexes created for print, web, and CD-ROM products? Or are indexing processes somehow integrated? What tools do you currently use for these processes?

8. What requirements do you have for *creating and maintaining hyper-links* in your documentation? Are they extensive? Do they only link within a single document? Within a set of documents? Are hyper-links ever to external documents, web sites, and the like? How is this work currently handled? What tools are used?

Section 2.2: Workflow

1. *How many users* do you anticipate working with the system initially? In its final implementation?
2. What *roles* do these users perform? (Examples would be writer, editor, and technical reviewer). Would a given user perform more than one role?
3. Do some reviewers require *read-only access*? Would there be a need to provide a class of users with the ability to review and annotate content but not change the underlying data?
4. Do certain users use *specialized tools* (e.g., for indexing, production, etc.)?
5. Describe your requirements for *annotating documents* (perhaps in both “live” versions and review copies and/or PDFs). Do you have a need for multiple users to annotate a single source document? Do you have a need for persistent storage of comments?

Section 2.3: Management/Versioning

1. Describe your requirements for *check-in and checkout*. How comprehensive does this need to be? Would multiple users need access to a single document? Would you want users to be able to check out sections of documents? How granular would this need to be?
2. Do you have requirements for *remote users* needing to be part of editorial workflow? Would a long-term checkout process be sufficient, or do you require tighter integration of remote users with local users?
3. Do you have an extensive database of content to manage and update? Do you require *search and retrieval functions* within the content management system? Other kinds of finding aids?
4. How important is it that the content management system include an easily *navigable GUI* for editorial contributors? What about visual metaphors for work in progress, such as “desktops” and “in-boxes”? What about graphical tools for workflow?
5. Do you require comprehensive “*redlining*” functions for documents in progress and finished work? Do you deliver loose-leaf updates of books?

6. In general, what are your requirements for *revision control*? Specifically, do you require that a comprehensive history be maintained of document versions so you can recreate or republish each and every version of a document? Do you need to maintain an extensive audit trail of who changed what, and when? Is your documentation part of any kind of government compliance or regulatory process? Discuss.

7. Do you require *tight integration* of the content management system with applications such as authoring? Would you want, for example, individual users to be able to easily override defaults for launching applications?

What about requirements for *reporting* from the system? Would it be useful to have reports of the following types:

- “Where used”
- “Who has what”
- “Current status of (document|object|graphic)”
- “Late/pending/due by”

9. Would you like the system to provide *data for productivity metrics*? Discuss.

10. Would you like the system to enable automatically *triggered events*, such as email distribution, posting of work in progress? Discuss.

11. Would you like the system to be integrated with *project management* and/or scheduling tools? Discuss.

12. Should the system be capable of providing *ad-hoc management reports*?

Section 3: Content Distribution/Publishing

In this section you will detail requirements for how the content is ultimately published and distributed. The focus here should be on high volume and automated production of output in multiple media.

Section 3.1: Print

1. How many *total pages* does your documentation represent? How many new pages are printed each year? Revised pages?
2. What is the *trim size* of the printed books? Do you distribute print documentation to both US and European markets? Does trim size vary?
3. Do you have requirements for *fold-outs* or other pages trimmed to a different size?
4. Do you have other *unique printing requirements* (other materials included in shrink wrap, quick reference cards, brochures, etc.)?
5. Do you print any pages in *color*? How many colors? Does color printing include continuous tone images?

6. How are the books *bound*? Are all books bound the same way?

7. How *many copies* of the books are typically printed? How frequently do you print?

8. Do you employ a *looseleaf* model for distributing updates? How often do these go out and how extensive are they?

9. Do you *deliver PDF* or PostScript with the anticipation (or requirement) that customers will print from the PDF? Are the PDFs optimized for print or screen?

10. In addition to or instead of bulk print runs, do you also support *print on demand*?

Section 3.2: Help

1. What *types of Help* material do you deliver? What tools do you currently use to produce Help files?
2. How *extensive* is the Help system (number of files, total data)?
3. Do you have *any specialized requirements* for producing Help? Discuss.

Section 3.3: CD-ROM

1. What *platforms* are you required to support with your CD-ROM distribution? Is there a client application?
2. What file format(s) is delivered for the *core text*? (HTML, PDF, SGML, Proprietary)?
3. What file format(s) is delivered for *graphics*?
4. Do you have requirements for difficult formats such as extensive *tables* and math?
5. What requirements do you have for *including search* in the CD-ROM distribution? What do you currently use for search technology? How is the data prepared for the search engine?
6. What requirements do you have for *hyper-linking* in the CD-ROM? Within documents? Across documents? From the CD-ROM to the Web?

Section 3.4: Web

1. What *browser(s)* need to be supported for any kind of HTML or web deployment you have?
2. What file format(s) is delivered for *graphics*?
3. Do you have requirements for difficult formats such as extensive *tables* and math?
4. What requirements do you have for including *search* in the web distribution? What do you currently use for search technology? How is the data prepared for the search engine?
5. What requirements do you have for *table of contents* generation? Do you have lengthy and hierarchical tables of contents? Are they heavily used for navigation?

6. What requirements do you have for a “back of the book” or keyword style *index* for the web?

7. Do you currently use or anticipate needing *other finding aids* for the web?

8. Do you have requirements for *database interactivity* or access to be connected with your web distribution?

9. Do you have requirements for integration with *other applications* through your web distribution?

10. Do you have requirements for *personalization* of the web distribution, or at least customization at the organizational level?

11. Do you have requirements for “*syndicating*” the web distribution? Where, in effect, your web distribution is also carried by other web sites?

12. Do you have requirements for *multilingual deployment* over the web?