IFES

### Features and Functionality v1.1 February 2015



# Document Control

## Amendment History

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| --- | --- | --- | --- |
| **Version Number** | **Date Issued** | **Amended By** | **Reason for Change** |
| 1.0 | 2/17/2015 | Emily Robichaux | Initial Requirements |
| 1.1 | 2/19/2015 | Emily Robichaux | Edits per Daniela’s feedback |

## Review List

This document has been issued to the following for review. Each individual is required to sign off their area of expertise. A date will be entered into the ‘date’ column if the business area has responded and blank if not.

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| **Name** | **Role** | **Reason for Inclusion** | **Date** |
| Daniela Colaiacovo | Director, Communications and Advocacy | Project Sponsor |  |

# Purpose of this Document

**This document is designed to**

* define all specific quality standards necessary to ensure that the level of service delivered is at least that which the client is expecting to pay for,
* define the high level functional requirements of this project, and
* act as the signed and documented agreement between supplier, and the client as to the business requirements that will be fulfilled.

The level of detail provided will be sufficient to allow the design and production team to consider what technical options may be available to fulfill the requirements and to then recommend which of those options provides the best match.

**This document will not**

* summarize, derive or discuss the justification for the project, and
* document any requirements that cannot be definitively measured for proof of delivery.

Once authorized, it will only be amended by ‘Formal Review’ and sign-off of a newer revised version. Note that a change order allocating additional time to the project may be required if changes to this document are requested after initial sign-off.

# Features and Functionality

All features and functionality listed here should be reviewed in light of the Site Audiences and Goals, as previously defined. This will help prioritize features and functionality, as all requirements documented here may not be able to be met within the contracted hours.

This list should also be reviewed alongside the Project Build Spec document and the wire frames. If a requirement is not documented in one of these places prior to approval, a change order may be required to add it later during the project or be handled via the maintenance contract after launch.

1. **Admin Authentication**

IFES will have the ability to create user accounts in Drupal for staff members who need access. IFES will also have the ability to block or delete admin user accounts as needed.

Active Directory integration for admin user authentication was removed as a requirement per IFES.

Taoti will utilize the standard Drupal administrative login to meet this requirement.

1. **Admin Content Workflow**

The content management workflow will be role-based, with site administrators having full technical and content access. Content administrators will have full access to content and will have authority to publish content. Content editors will have the ability to add and save content without the ability to move or delete content; content authored by content editors must be published by a content administrator or site administrator.

Node versions will also be tracked, including the date, time, and username associated with each version. All administrative users will be able to view all versioning information. Only site and content administrators will be able to revert to or delete previous versions.

Note that version history does not indicate the actual change made in the content.

1. **Admin users are able to post entries to various sections of the** **website**

All admin users will be able to create nodes in all of the pre-defined content types. Publication of those nodes will follow the workflow described above. Each content type will have one pre-defined layout. Should IFES desire additional layout options, these could be addressed by providing training on blocks.

Content editors will not be able to edit views, blocks, or nodequeues, including those governing the home page.

1. **Admin users are able to upload and manage media files**

All admin users (all roles – content editors, content administrators, and site administrators) will be able to upload files directly to the Drupal website, and the process for uploading files will be the same for PC and mac users. Accepted files will include images (.png, .gif, and .jpg) and documents (.pdf, .txt, .doc, .docx, .xls, .xlsx). Taoti’s expectation is that all video and audio files (podcasts) will be hosted on a third party platform like YouTube or Vimeo.

1. **WYSIWYG Advanced text editor**

Each pre-defined content type will have an advanced WYSIWYG text editor configured to apply site styles for

* + - * Formatting styles
      * Paragraph styles
      * Text alignment
      * Text indentation
      * Block quote
      * Horizontal rules

Basic text formatting such as bold, italic, underline, hyperlinking, numbered lists, and unordered lists will be available. In the interest of presenting a cohesive and polished design, Taoti does not recommend using different fonts, font sizes, or text color within a WYSIWYG.

Images can be embedded into WYSIWYGs, and alt-text, captions, and borders added to them.

YouTube videos and Flickr galleries can be embedded into WYSIWYGs using iframes. Flash elements will not be supported in the WYSIWYG.

Taoti will work towards a solution for table formatting that is responsive and Section 508 compatible. Note that doing extensive formatting within WYSIWYGs usually does not produce a good mobile experience.

All WYSIWYG functionality listed will be available to all roles unless otherwise specified by IFES.

Taoti will likely utilize the CKEditor module to meet this requirement.

1. **Tagging**

Taxonomy lists and the content types available for tagging have been defined in the Project Build Spec document.

1. **Accessibility**

Making a website compatible with Section 508 guidelines requires both technical capabilities (example: the alt-text field exists) as well as content (example: the alt-text field has an entry). Taoti will provide tools that allow IFES.org to achieve the 508 compatibility points listed below but will look to IFES to provide the required content.

* A text equivalent for every non-text element shall be provided ("alt" tags).
* Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.
* Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup. The site should also not rely on color alone to convey a message.
* Documents shall be organized so they are readable without requiring an associated style sheet.
* Row and column headers shall be identified for data tables.
* When pages utilize scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by assistive technology.
* When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet.
* When electronic forms are designed to be completed on-line, the form shall allow people using assistive technology to access the information, field, elements, and functionality required for completion and submission of the form, including all directions and cues.
* A method shall be provided that permits users to skip repetitive navigation links.

1. **RSS feeds**

The new IFES home page will display a feed of electionguide.org.

An XML sitemap similar to <http://americaabroadmedia.org/sitemap> will be viewable to non-authenticated users.

The RSS feeds displayed on the current RSS feed page (<http://www.ifes.org/RSS.aspx>) will not be replicated on the new site, per IFES.

1. **Payment management**

The CRM to be selected by IFES will manage payments. While payment forms may be embedded into Drupal, the payments will pass through a third party system, and payment records will not be stored in Drupal.

1. **Event management**

The CRM to be selected by IFES will provide the event management functionality such as e-blasts, registration, payments, program creation, adding to calendars, and recording a person’s attendance, etc.

Basic information about Events, including a URL to the registration page/form provided by the CRM, can be added into Drupal via a content type, as detailed in the Project Build Spec document.

1. **Download events for Outlook, Google, and iCal files**

The CRM to be selected by IFES will provide this functionality.

1. **Content search**

Taoti will provide a site search of all content published on the site. This will include content entered into nodes as well as properly formatted PDF documents via Apache Solr (please note there are specific hosting requirements that must be met in order to utilize Solr). Users will also have the ability to refine searches via a faceted search. If time allows, predictive text search functionality will be enabled.

A search bar will be present in the header, which will be persistent across the site, even as a user scrolls down long pages.

1. **Story Bank**

Stories will be entered into Drupal using a content type, as detailed in the Project Build Spec document. As nodes, they will be searchable on the website and can be tagged using the pre-defined taxonomy lists. All content entered into the description field on these nodes will be viewable to all readers. Should IFES determine that users must contact IFES for the full text, those instructions can be included in the description field.

Building a separate, searchable database specifically for stories is not in scope for this project. A change order will need to be executed in order to add this deliverable to the project scope.

1. **Online polls/surveys/questions to engage visitors**

As IFES prefers to use Drupal-based functionality rather than a third party platform, Taoti will provide an out of the box installation for a basic questionnaire/quiz with data export capabilities.

1. **Email campaign management**

Email blast and list segmentation capabilities will be provided by the CRM to be selected by IFES.

1. **Cookies that recognize repeat visitors and provide information on their preferences**

Due to privacy concerns, especially among European audiences, cookies tracking user behavior will not be used on the site. Instead, related information will be leveraged more thoroughly throughout the site, so that any country, publication, expert, etc. page will display other information related by the pre-defined taxonomy lists. Further, users will be able to self-segment via the newsletter sign up form provided by the CRM to be selected by IFES. Through better use of related information on the site as well as more robust CRM functionality, the end goal of providing content that is interesting and relevant to each user will be met without using a technique that may be off-putting to users.

1. **Require contact information from users before watching webcasts or downloading reports and papers**

Taoti is unable to address this requirement until decisions have been made regarding a CRM and whether the existing webinar vendor/host will be maintained going forward.

Our suggestion is to have this information be collected by the CRM rather than a webform housed in Drupal. Further, we recommend giving users the option to opt out of providing this information so it does not become a barrier to accessing the content. For example, we could create a page in front of webinars with fields for contact information as well as a small link allowing users to go straight to webinar.

1. **User** **Dashboard/Targeted content**

This request is similar to the cookie-related one above. Users will be able to self-segment via the newsletter signup form, and the new website will display content related to the country, publication, expert, etc. being viewed. Thus, users will have access to targeted content without needing Drupal logins that would likely act as a barrier to viewing the content.

1. **Print-friendly style sheet**

The baseline functionality provided by AddThis will be leveraged for this requirement.

1. **Email articles to friend**

Taoti will enable site users to email URLs and typically leverages AddThis to provide this functionality.

The requested functionality of capturing the sender’s and recipient’s email addresses and interests and syncing this information into the CRM would violate the terms of service of AddThis (please see <http://www.addthis.com/privacy>) and may violate those of the CRM/email provider as well. Typically these platforms do not allow the opting in of users without explicit consent.

1. **Easier liking, sharing, retweeting, and pinning** **content**

Taoti will enable site users to share site URLs via Facebook, Twitter, and Pinterest and to “like” content via Facebook by leveraging the AddThis platform to provide this functionality. The sharing buttons will be prominently placed

1. **Action overlays**

Taoti will provide IFES with the ability to create home page lightboxes with a background image and text overlay. The text will be entered via a WYSIWYG and will have the formatting options outlined above. A start and end date for the lightbox can be set by IFES. The transparency surrounding the lightbox will be pre-defined and cannot be changed by IFES. The creation of lightbox nodes will follow the workflow outlined above.

The lightbox will appear on the user’s first visit to the site. The lightbox will not appear after the user takes the suggested action or after the user closes the lightbox (both of these actions will set a cookie on that user’s browser). If the user clears his/her browser cache, thus deleting the cookie, the lightbox will appear again on his/her next visit to the site.

1. **Dark Site Implementation**

Taoti will use the current dark site as inspiration and update it based on the new design. Our opinion is that it does not meet the goal of the site (being a “back up” website in the event the primary website is taken down by a hacking attack) to have this site be on the same platform (Drupal) as the main site, as the attack that would exploit the main site could then take down the dark site. Therefore, Taoti suggests that the dark site be a flat HTML site with no more than five pages. Taoti will provide documentation for updating the content, which will likely occur through FTP.

Regarding hosting the site, Taoti recommends that IFES use a different host/server for the dark site for further security. An inexpensive hosting option like GoDaddy could be utilized.

1. **Internal Drupal Reporting**

Taoti can create a custom Google Analytics dashboard and set up automatic emails (monthly, quarterly, etc.) to provide insights into website usage. IFES will need to define the metrics that should be tracked, such as unique visitors, return visitors, bounce rate, entry/exit pages, etc.

1. **Google Analytics integration**

Taoti can provide training on configuration of event (action) and download tracking. Typically the creation and embedding of custom Google Analytics codes is required. The goal is to provide analytics on site visitor’s countries, time spent on each page, and how they find the website. Analysis of the statistics, such as determine what triggers greater retention, will be provided by IFES.

1. **Form pages (web forms)**

Basic web forms will be created per IFES instructions and as detailed in the Project Build Spec. Fellowship applications will be handled via Word document or writeable PDF and will not be webforms. Drupal web forms can accept attachments and export them along with the form submission.

The web forms will allow people using assistive technology to access the information, field, elements, and functionality required for completion and submission of the form, including all directions and cues.

1. **Annual report**

IFES will be able to embed an interactive timeline using the tool displayed here: <http://timeline.knightlab.com/>. IFES will be responsible for creating the timeline and importing all needed content. Taoti will train IFES on how to embed the code produced by the timeline tool into a Drupal node. Taoti will also train IFES on how to embed audio/video files hosted on YouTube of Vimeo into a Drupal node. IFES will need to provide the embed codes for the timeline and for at least one YouTube at least one week prior to the training.

# Exclusions from Scope

1. **Annual report microsites**

Providing an annual report microsite (separate URL), additional functionality (multi-page, separate navigation, etc.), and/or special styling (cannot inherit the styles defined for IFES.org) beyond what is detailed above is out of scope for this project. A change order will need to be executed for this design and development work, or it could be addressed using the hours allocated for maintenance following launch. Examples of this include: 2013.salvationarmyannualreport.org, www.kiva.org/annualreport/2012.

1. **Searchable media library**

IFES staff indicated that a Digital Media Library for photos is in progress. It is currently housed on the IFES intranet (SharePoint 2010). While the stated eventual goal is for this library to be searchable by website users, and possibly for website users to request the use of images and to submit images, enabling the search of files and images beyond those uploaded to the website (via the File Upload and Management deliverable documented above) and/or integrating with the SharePoint database is beyond the scope of this project. A change order will need to be executed in order to add this deliverable to the project scope, or it could be addressed using the hours allocated for maintenance following launch.

1. **File Conversion and Management**

The conversion of existing video files from Flash to other formats (as needed) and the uploading of files to external platforms such as YouTube will be performed by IFES staff.

1. **Section 508 compatibility**

If not already provided in the data in a manner conducive to importing/exporting, the entry of alt tags, video transcripts, etc. needed for Section 508 compatibility will be the responsibility of the IFES staff.

1. **Data management and manipulation prior to content entry**

Taoti will programmatically migrate as much content as is possible within the hours allocated for this task. However, there may be limitations to how much can be achieved, due to the current content structure and cleanliness of the data. Manual content entry and/or manual updates of content will likely be needed; these tasks may include but are not limited to tagging of content, removing hardcoded links, converting files, etc. IFES staff will be trained on managing content within Drupal and will need to manage manual content entry as needed unless additional hours are authorized on the project.

1. **Commenting on some content types**

This requirement was removed from scope for launch but could be implemented using the hours allocated for maintenance following launch.

# Compatibility

Taoti designs websites to be compatible with major modern browsers and mobile devices. Our modifications will be tested against the following to ensure compatibility.

## Browsers

This list of browsers is ranked in order of browsers used most frequently for viewing the IFES.org website over the past six months.

* Chrome
  + The IFES website will be compatible with the latest version of Chrome at the time development begins.
* Firefox
  + The IFES website will be compatible with the latest version of Firefox at the time development begins.
* Internet Explorer
  + The IFES website will be compatible with version 9+ of IE. Less than 1% of current IFES.org users are using IE8. Taoti can provide a much better responsive experience for more users by focusing only on newer versions of the browser.
* Safari
  + The IFES website will be compatible with the latest version of Safari at the time development begins.

## Mobile Devices

* iPhone
  + The IFES website will be tested against the two most recent generations of the iPhone at the time production begins. This will likely be the iPhone 5 and the iPhone 6. IFES may choose to replace the iPhone 5 with the iPhone 6 Plus upon request.
* iPad
  + The IFES website will be tested against the two most recent generations of iPad tablets at the time production begins. This will likely be iPad Air and the iPad Mini 2.
* Android smartphone
  + The IFES website will be tested against the most recent generation of Samsung Galaxy and Google Nexus Android smartphones at the time production begins. This will likely be the Galaxy Note S5 and the Google Nexus 4.
* Android tablet
  + The IFES website will be tested against the most recent generation of Android tablets at the time production begins. This will likely be the Galaxy Tab 4.

Taoti will specifically test the website on the devices listed above. As the site will be responsive, display on other mobile devices should benefit from the work done to optimize display on the above devices, but inconsistencies may exist. Testing and configuration on additional mobile devices can be authorized by IFES through a change order or addressed using the hours allocated for maintenance after launch.