

**Request For Proposal:
Content Management System for
Monash University**

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Printed: 14/12/01 9:18 AM

Revision History

Revision No.	Date	Change
Draft 0.1	12/9/2001	Document created
Draft 0.2	01/10/2001	Initial Revision
Draft 0.3	07/11/2001	Further trivial changes to document layout
Draft 0.4	04/12/2001	

TABLE OF CONTENTS

1.0	OVERVIEW.....	5
1.1	ABOUT MONASH UNIVERSITY	5
1.2	DEFINITIONS.....	6
1.3	FORM OF PROPOSALS.....	6
1.4	SUBMISSION OF PROPOSALS.....	6
1.5	SELECTION CRITERIA.....	7
1.6	SELECTION PROCESS	8
1.7	INTELLECTUAL PROPERTY	8
1.8	DISCLAIMER	8
2.0	BACKGROUND INFORMATION.....	9
2.1	CURRENT ENVIRONMENT	9
	<i>Content Creation Tools.....</i>	<i>9</i>
2.1.1	<i>Server Operating Systems.....</i>	<i>9</i>
2.1.2	<i>Client Operating Systems.....</i>	<i>9</i>
2.1.3	<i>User Environment Applications.....</i>	<i>10</i>
2.1.4	<i>Future CMS applications to be considered.....</i>	<i>10</i>
2.2	GOALS OF RFP.....	10
2.3	MONASH UNIVERSITY SITE INSPECTION	10
3.0	INFORMATION SOUGHT FROM RESPONDENTS.....	11
3.1	CORPORATE INFORMATION	11
3.2	PRICING	11
3.2.1	<i>Price Related Issues.....</i>	<i>12</i>
3.2.2	<i>Additional Charges.....</i>	<i>12</i>
3.3	SERVICE RELATED INFORMATION.....	12
3.4	OTHER SPECIFIC QUESTIONS	13
3.5	INTEGRATION WITH OTHER PRODUCTS	13
4.0	PROPOSALS.....	14
4.1	REFERENCE SITES	14
4.2	ONGOING SUPPORT	15
4.3	TRAINING.....	15
5.0	SOLUTION EXPECTATIONS.....	16
5.1	PERFORMANCE.....	16
5.2	COST EFFECTIVENESS.....	16
5.3	ACCOUNTABILITY	16
5.4	SCALABILITY.....	16
5.5	COMPLIANCE WITH EXISTING INFRASTRUCTURE	16
5.6	FAULT TOLERANCE.....	16
5.7	UPGRADE PATH.....	16
5.8	ONGOING SUPPORT	16
5.9	HTML KNOWLEDGE	17
5.10	META-CONTENT.....	17
5.11	LAYERING	17
5.12	WORKFLOW AND SIGN-OFF PROCESS.....	17
5.13	TEMPLATE SYSTEM (DESIRABLE).....	17
5.14	ROLES-BASED SECURITY MANAGEMENT (DESIRABLE).....	17
5.15	BACK OFFICE INTEGRATION	17
5.16	OUTPUT CHANNELLING	17
5.17	CHANGE INDEPENDENCE.....	18
5.18	FILE UPLOADING / ASSET MANAGEMENT (DESIRABLE)	18
5.19	VERSIONING AND VERSION ROLLBACK.....	18
5.20	STANDARDS COMPLIANCE.....	18
5.21	STAGING ENVIRONMENT.....	18
6.0	PROOF OF CONCEPT.....	19

7.0	ACCEPTANCE TESTING	19
8.0	SCHEDULE.....	19
9.0	REQUIRED FEATURES.....	21
9.1	SYSTEM FEATURES	21
9.2	BROWSER	22
9.3	PRICING.....	22
9.4	INTEGRATION.....	22
9.5	SECURITY	22

1.0 OVERVIEW

Monash University wishes to acquire and implement a Content Management System (CMS) for its central web publishing. Initially, the CMS will be implemented on the central webs servers, with other web servers being incorporated as required.

The CMS is expected to form the basis of a number of services, including:

- Automated, audited workflow and sign-off process management
- Templating
- Roles-based security management
- Scheduled launch and archiving
- Staging, development and testing areas
- Separation of content, presentation and site structure
- Versioning
- Output channelling

The successful respondent to this Request for Proposal (RFP) will be selected with its product(s) likely to be deployed for a period to span five or more years, although it is envisaged that the solution would be rolled out over a period of time, starting with a pilot group. Responses should reflect this perspective.

1.1 About Monash University

Monash University is Australia's largest, and by many measures most diverse university. In the forty years since its foundation, Monash has become one of the most innovative and original centres of higher education in both Australia and the Asia-Pacific region. From an initial enrolment of 363 in 1961, the university's population has grown to encompass more than 42,000 students.

Monash vigorously pursues its goals of excellence in teaching, research and community service, and maintains its reputation for engagement and leadership in local, national and international affairs.

Monash University has six campuses in Victoria, a campus in Malaysia, a campus in South Africa (commenced operations in early 2001), a study centre in London, (focus of a major strategic alliance between Monash University and King's College, London), a study centre in Prato (Italy) and plans to open additional campuses overseas in the future. Monash has a commitment to an extensive distance education program, and a requirement to provide information technology resources and information dissemination to an increasing number of locations both within Australia and offshore.

Under the leadership of its Vice-Chancellor, Professor David Robinson, Monash University has developed a number of forward looking plans, the latest of which is entitled "Leading the Way - Monash 2020" (available at <http://www.monash.edu.au/monashplan/>). The plan continues themes developed in the previous institution-wide 5-year rolling plan, focusing on the use and importance of information technology in providing flexible and innovative methods of teaching and learning, in facilitating distance education and the globalisation of Monash University, and in supporting University research activities.

Approximately 10,000 staff and 45,000 students make up the Monash University community. There are approximately 10,000 personal computers

located on the Monash campuses, and there are thousands more at the homes of staff and students, in addition to many portable and laptop units. Furthermore, Monash's IT infrastructure which provides networking, servers and computational resources to underpin the mission of the University relies on hundreds of additional IT service units of all kinds.

More information about the University, its faculties and campuses can be found on the Monash WWW server at <http://www.monash.edu.au/>

Monash will attempt to answer questions of those intending to submit a proposal. Monash prefers that questions be submitted via e-mail to Sue.Steele@its.monash.edu.au. These Questions will be addressed at a pre-arranged briefing session.

Information Technology Services Division manages the University's IT infrastructure. Further details of the Information Technology Services Division's services and activities are located at <http://www.its.monash.edu.au/> and related pages.

1.2 Definitions

ITS	Information Technology Services
W I F	Web and Internet Facilities are a section within ITS which has responsibility for Web, Messaging, Directory & Internet Services support and policy.
POC	Proof Of Concept
CMS	Content Management System
WCM	Web Content Management

1.3 Form of Proposals

Please refer to section 3, 4 & 5 of this document for details. Responses to each item should include a definite statement of "comply" or "not comply". Vague phrases such as "noted", "partial", "tba", "n/a", "4Q2001", etc. are unacceptable and will be treated as "not comply".

1.4 Submission of Proposals

Written proposals in duplicate should be sealed and addressed to:

Sue Steele
Web Team Leader
Infrastructure Services
IT Services Division
P.O. Box 28C
Clayton Campus
Monash University
Vic 3800, Australia

Submissions are to arrive not later than 5.00 pm, <<insert submission date here>>.

Hand-delivered proposals should be left at the ITS Reception Counter, Ground Floor, Building 28 (Mathematics Building), Clayton Campus, Monash University. Please note that during non-teaching periods, the Reception Counter closes promptly at 5.00 p.m.

In addition to copies on paper, respondents should also forward an electronic copy of the proposal (in plain text, MS Word or Adobe Acrobat PDF formats) enclosed on a 3 1/2" diskette, CD-ROM or as an e-mail attachment to Sue Steele.

Any questions about the requirements should be addressed to::

Sue Steele
Phone: +61 3 990 54742
Fax: +61 3 990 54746
e-mail: Sue.Steele@its.monash.edu.au

The University prefers that questions be in writing and addressed at a single arranged briefing meeting.

1.5 Selection Criteria

Monash University reserves the right to negotiate variations in any proposal; to not select the lowest or any proposal; to select only parts of proposals; or (under extreme circumstances) to select a part of one proposal for use in connection with a part of another proposal. No reasons will be disclosed for the rejection of any or all proposals. Criteria for evaluation of proposals will be broad and will cover all areas, including for example:

- **Corporate**
Demonstrated ability to deliver against the proposal. Perception of the likelihood of the proposer remaining a leading force over the next 5 to 10 years. Perception of the proposer's organisation's ability to properly support Monash University. Track record in reselling into comparable markets.
- **Technical and Administrative**
Perception of the proposer's ability to understand and deal with the complexities of Monash's IT infrastructure.
- **Technical Soundness of the Proposal**
Expertise and competence of those who put the proposal together. Perception of flexibility of the proposer's organisation to meet Monash University's range of needs. Perception of the proposer's relationship and standing with Monash's major IT suppliers.
- **Contractual**
Terms of the proposed contract between Monash University and the successful bidder(s).
- **Prices and value for money**
- **Risks**
Monash will give significant weight to the risks involved in considering proposals. Clauses in the contract which offer the University protection against unsatisfactory performance will be taken as an indication of the

proponent's conviction that it will be able to meet requirements of Monash University.

1.6 Selection Process

The selection process will consist of evaluating vendors responses, selecting vendors for demonstrations, reference site visits, selecting a vendor for a proof of concept and proceeding to full implementation.

1.7 Intellectual Property

Ownership of copyright and all ideas embodied in this document remains the property of Monash University. All information supplied in proposals will remain commercial in confidence and will, unless otherwise stated, be retained by Monash University.

1.8 Disclaimer

Whilst care has been taken in the development of this document, Monash will not accept responsibility for any loss etc resulting from reliance on the material presented or errors or omissions. It is the responsibility of proposers to fully inform themselves in all material regards.

2.0 BACKGROUND INFORMATION

Monash University hosts many web sites for a diverse group of users. Most of these web sites are managed centrally by WIF. Over time, these web sites have become an integral part of Monash University's core business.

Deficiencies in the current web environment are as follows:

- Lack of versioning and rollback systems
- Lack of a central workflow and approval process
- Extra work required to convert existing content to other output formats
- No central template system
- Other web or publishing environments cannot be easily integrated
- Difficult to devolve site administration to groups of users
- No central storage area for common site assets

Monash University currently hosts around 50 web servers in the central web cluster and around 40 Faculty and Departmental web servers, serving approximately 500,000 web pages. On average, the central web server cluster receives 10 requests a second.

2.1 Current Environment

Web Server Architecture

- Apache 1.3.20

File Transfer Protocols

- ftp
- scp
- web_dav

Content Creation Tools

- Microsoft FrontPage
- Macromedia Dreamweaver 3 and 4
- Microsoft Word
- Other text based editors

2.1.1 Server Operating Systems

A list of Operating Systems is included for reference only. Monash's central web servers currently run on Digital UNIX (Tru64 5.1). Many faculty and departmental web servers can run on any of the following:

- Novell Netware 4.1
- Novell 5.0
- Solaris 2.6
- Solaris 7.0 (soon to be v8.0)
- Irix 6.5
- Linux Redhat 5.2, 6.0, 6.1, 7.0 and 7.1
- VMS 6.2, 7.2
- Open VMS 6.2
- Digital Unix 4.0E, 4.0D, 4.0F, V5.X
- Windows NT SP4 & SP5
- Windows 2000
- Mac OS 9, Mac OS X

2.1.2 Client Operating Systems

A list of Client Operating Systems is included for reference only.

- Windows 98
- Windows NT
- Windows 2000
- Mac OS 9, Mac OS X

- Linux Redhat 5.2, 6.0, 6.1, 7.0 and 7.1

2.1.3 User Environment Applications

- MS Windows (95, 98, NT & 2000), Linux, Solaris, Apple Macintosh (OS 9.0.4+ and OSX)
- Netscape Communicator 4.7. This is Monash University's supported web browser. All solutions must work with this software.
- Macromedia Dreamweaver 3 and 4
- Microsoft FrontPage

2.1.4 Future CMS applications to be considered

- Other publishing systems
- Ability to generate a range of different output formats (HTML, PDF) from a single source (preferably XML)

2.2 Goals Of RFP

The goal of this RFP is to:

- source a vendor who can provide the expertise, support and tools to assist ITS to achieve these goals
- implement a content management system for Monash University

2.3 Monash University Site Inspection

Vendors may visit Monash University ITS Computer Room and meet with Monash staff prior to proposal submission, to attain information which may be relevant to formulation of the proposal. This can be arranged via Sue Steele on +61 3 9905 4742.

3.0 INFORMATION SOUGHT FROM RESPONDENTS

3.1 Corporate Information

Respondents should include information in their responses covering the following areas and issues:

- **3.1a** - Corporate information, including:
 - ACN - Date of establishment - State/territory in which the company is registered
 - Nature of the organisation - partnership, public company, private company, subsidiary etc.
 - Directors/Owner(s)
 - Primary business
 - Company structure
 - Company Mission/Vision
 - Annual company report for the most recent year
 - List of recent awards - e.g.
 - Location of offices
 - Web presence - URL
- **3.1b** - Strengths in the tertiary education market
- **3.1c** - Strengths in the government and corporate sectors
- **3.1d** - What is the company's commitment with regards to the provision of Content Management Systems in the short, medium and long term?
- **3.1e** - Details of accreditation with other Content Management System providers.
- **3.1f** - Number of Content Management Systems administered
 - In Australia
 - In Victoria

3.2 Pricing

To enable Monash University to justify the costs of each software product on its merit, the proposal must include a schedule of costing on the following basis:

(The definition of a software product would be a product, which covers a required feature, e.g Registration Authority Software.)

- **3.2a** - itemised pricing for each component
- **3.2b** - bundled pricing where applicable. This is in addition to, not instead of itemised pricing
- **3.2c** - cost of each software product to cover our requirements
- **3.2d** - cost for a site licence for each software product if applicable
- **3.2e** - licence required for each piece of hardware specified in section 9 of this document
- **3.2f** - consulting cost on a per day basis
- **3.2g** - training costs to implement proposed solution

To provide Monash University with an understanding of the ongoing cost of the proposed solution, please provide the following:

- **3.2h** - all associated costs of future software upgrades
- **3.2i** - support contract costs
- **3.2j** - annual software licence maintenance costs as a percentage.
- **3.2k** - the average annual increase of software licence maintenance costs for the past 5 years, as a percentage. This will be incorporated into an agreement for the solution as a cap on future increases.

At any time during the proof of concept or implementation phase, Monash University reserves the right to remove an item from the installation, removing the cost from the contract price. The reduction in cost will be based on the itemised costing provided by the vendor. The vendor will incur all expenses related to the installation and/or removing the product.

Site licensing of software is very appealing to Monash University, hence any options for site licensing should also be provided.

State the discount offered from the Standard price list, and the period for which such discount will be offered - one, two three or more years. What is the basis of the discount, eg educational, number of users etc?

State prices offered, whether freight or delivery is included or not, and if not included, applicable freight or delivery charges.

For other products/services to be delivered as part of the proposal which were not in the detailed requirements, state prices applicable or whether such items will be included with no additional charges.

Please note that all quoted prices should be exclusive of GST.

3.2.1 Price Related Issues

What are the bases for any variations in pricing or discounts offered?

What capacity is available for passing on price reductions under this proposal?

What capacity is there to make price specials available to Monash University?

What are the terms for payment?

On what basis would prices be increased?

Please list the frequency of price variations for your product components over the past 3 years. Also list, when the variation occurred, the amount of the variation and whether it is/was an increase or decrease.

3.2.2 Additional Charges

Any additional charges for services should be listed - together with details as to when such charges apply, and what mechanisms are available to Monash to review or challenge any price increases during the term of the agreement.

3.3 Service Related Information

List all services to be provided to the University by the vendor. Include nature of service, how often or under what circumstances will it be offered, and whether the service is included as "Value-add" or whether an additional charge is involved.

Will representatives meetings be available for the Meetings to be scheduled upon request?

Describe what administrative responsibilities will your organisation assume - and what responsibilities will fall on Monash University?

Does your company provide pre-release or beta copies of updates of new releases and upgrades?

3.4 Other Specific Questions

In what state or territory will administration of Monash's proposal take place?

Describe the ordering and billing processes used by your company - e.g. how does Monash University order updates etc.

How long has your company been managing Content Management Systems?

- in Australia
- in Melbourne

How many Content Management Systems does your company administer?

- in Australia
- in Melbourne

How might your proposal be differentiated from proposals by other companies?

Do you offer an advice line? Is it free or is there a charge? If charged for, what are the rates?

3.5 Integration With Other products

The proposed solution must enable integration with current web publishing systems in use by Monash University.

4.0 PROPOSALS

Proposals are expected to be comprehensive and include information on the following.

- Provide a detailed technology based solution to meet the objectives of the project specified in Section 2 of this document.
- Corporate and general information - relevant information about the company submitting the proposal, eg. size and experience, sufficient for the University to assess the background and capabilities of the company.
- Commercial and full itemised pricing information - sufficient for the University to determine the price of all components and options of the proposal, together with the various commercial conditions applicable.
- Reference sites and experience with CMS in similar sized, relevant (eg education) areas.
- Differentiating factors of your proposal.
- Any other matter thought by the proponent to be important to the assessment of the proposal.

Proposals should contain copies of the contracts, which it is proposed that the Company enter into for appointment as Monash's CMS provider.

Proposals will be accepted in which proposed solutions are detailed. Each component solution must describe the design philosophy of the solution.

Proposals must detail the suitability of the proposed solution, making reference to the Mandatory and Desired required features specified in Section 9.

The proposal will include details on support offered with the system now and in the future together with any training available to its administrators. Sufficient training will be included in the proposal for Monash staff to configure the system for all supported systems.

Each proposal will describe the mechanisms and requirements for interfacing CMS to each platform for which it is claimed to be suited. Should any feature be unavailable on a particular platform, this will be specified together with the impact this may have on the users or administrators of the system.

Vendor's proposal must include:

- The requested information in the body of this document;
- What solutions are currently available;
- Characteristics of those systems;
- Information on developments or enhancements which can be expected over the next 2 years;
- Features offered which are not listed above;

4.1 Reference Sites

Prior to commencing a proof of concept, Monash University will want to visit two reference sites of comparable or larger size than Monash, where the proposed solution has been implemented successfully. Reference sites that are universities would be particularly useful. A list of reference sites that will be willing to provide Monash University with an overview of how the product has worked in their business is a requirement.

4.2 Ongoing Support

Ongoing vendor support is seen as a key component of a quality solution. Details should be provided on the support agreements available with your solution, including cost, response times, call logging procedures, escalation, support structure & any other relevant information.

4.3 Training

Training of Monash University ITS staff is central to the long term success of this project. A training program should be included as part of the proposal, detailing the training courses to attend and associated costs.

The training program should be directed at two levels, one for the administration of the product and the other for the technical support of the product.

5.0 SOLUTION EXPECTATIONS

Unless otherwise stated, all solution expectations are mandatory. Section 9 of this document contains a table version of these requirements.

5.1 Performance

Recommended hardware configurations should be provided.

5.2 Cost effectiveness

The CMS has to be cost effective. It is unlikely that new staff would be hired to administer the CMS that is implemented. The workload on existing staff to administer the service needs to be kept to a minimum.

5.3 Accountability

An appropriate audit trail of all administrator activities needs to be kept to encourage administrators not to abuse any administrative rights that they have.

5.4 Scalability

Details on the scalability of the proposed solution should be included.

Monash University is a diverse organisation. Solutions must be able to scale across campus locations.

5.5 Compliance with existing infrastructure

The current supported enterprise browser version is Netscape 4.77, likely to move to Netscape 6 within six to twelve months.

The CMS must integrate with both the current client environment, and the current server environment.

5.6 Fault Tolerance

It is imperative the CMS solution has a high degree of fault tolerance. **All single points of failure of the solution must be clearly indicated and where possible removed.**

5.7 Upgrade Path

The system will be upgraded to ensure that performance does not degrade as load increases, and to make use of the latest features. CMS often requires significant customisation as per the site needs. Details must be provided on how the product manages upgrades and how it retains all site specific customisation.

5.8 Ongoing Support

As University Staff come to rely on this service for transfer of confidential information, it is imperative the service be highly available. Ongoing vendor support is seen as a key component of a quality solution. Details should be provided on the support agreements available with your solution, including cost, response times, call

logging procedures, escalation, support structure & any other relevant information.

5.9 HTML Knowledge

Content must be editable without knowing any HTML or mark-up language, preferably using a standard browser interface.

In many cases, content can be authored in another tool, and placed within the control of the CMS.

5.10 Meta-Content

Content such as launch date, expiry date, content owner, copyright and access information should be captured by the CMS.

5.11 Layering

The CMS should separate the content, presentation and site structure into separate layers.

5.12 Workflow and sign-off process

Content need not always go through a workflow process, but must always go through a sign-off process.

The workflow and sign-off process must consist of at the very least:

- Creation
- Drafting
- Sign-off

5.13 Template System (desirable)

The template system should comprise the following features:

- Templates should be able to be applied to multiple sites
- Multiple sites should be able to use multiple templates
- A single site should be able to use many templates for different site sections
- There should exist the ability to have a single master template
- The template should contain references to required file assets
- A template can be based upon another template, and inherit its properties.

5.14 Roles-based security management (desirable)

The CMS must have assignable roles for each stage of the workflow and sign-off process. Authorised roles within this process are able to allocate roles to other users of the system.

5.15 Back office integration

The CMS must work within the currently supported environment at Monash University.

5.16 Output channelling

Content created in one channel should be able to be converted into other channels. Currently identified channels are as follows:

- Web (HTML, XHTML, XML)
- WAP
- Paper
- PDA
- CD-ROM
- PDF

This list of channels is by no means exhaustive, and may be changed as needs arise.

5.17 Change independence

Each change to content must be independent of all other changes.

5.18 File uploading / Asset management (desirable)

All manner of files can be stored with accompanying content.

Content assets are stored and managed in a central area.

5.19 Versioning and version rollback

Versions of content are to be stored by the CMS at each stage of the approval process.

The ability of the CMS to rollback (retrieve) past versions of content—and in particular an entire site—at a given version or date in the workflow process will be a key consideration in the acceptance of any CMS system.

5.20 Standards Compliance

The CMS should at the very least comply with the following standards:

- HTML 4.01
- XHTML 1
- XML 1
- CSS 1

5.21 Staging Environment

Content can be viewed and tested in a separate environment identical to the final delivery environment.

6.0 PROOF OF CONCEPT

Prior to full implementation of the proposed solution, a proof of concept (POC) will need to be performed. Payment for the proof of concept will be made once it has been demonstrated that the proof of concept has met the agreed criteria.

Prior to commencement of the POC, Monash University & the Vendor will negotiate an acceptable scope for the POC & the criteria to measure the acceptable success of POC. The decision as to whether the POC has met the criteria will be solely the province of Monash University.

The scope of the POC will be wide enough to demonstrate the breadth of solution. It should cover as a minimum:

- Integration with existing Monash LDAP Directory Server
- Process monitoring on Web Server
- Compatibility with existing Monash web server architecture
- Integration with current desktop environment

The details and results of all tests conducted during the POC at Monash will be supplied to the vendor for comment prior to proceeding to implementation.

After the POC, Monash University reserves the right to accept any, or any part of, or none of the solution to proceed to the implementation phase.

7.0 ACCEPTANCE TESTING

The University will undertake a series of acceptance tests to ensure all facets of the proposed solution have been delivered. These will include but may not be limited to:

- reliability of solution to deliver expected outcomes
- robustness of solution
- solutions delivery of required features
- benchmark testing
- functional operational testing
- load testing

Monash University will work together with the vendor to develop acceptance tests agreeable to both parties, but as a minimum the vendor must agree to tests covering the above areas.

8.0 SCHEDULE

Until a vendor has been selected to implement CMS, timeframes are difficult to assess. Therefore the timeframes below are estimates only, and Monash University reserves the right to amend these times.

- Issue of RFP
- RFP responses due

(4 weeks)

- Assess proposals
(2 weeks)
- Select a Vendor, including interviews
and demonstration, site visits
(4 weeks)
- Proof Of Concept
(6 weeks)
- Implementation
(Unknown)

9.0 REQUIRED FEATURES

9.1 System Features

Feature	Details	Mandatory	Desired
HTML Knowledge	Content must be able to be edited without knowing any HTML, using a standard browser interface	✓	
Meta-content storage	Meta-content must be captured, and stored separately to the content	✓	
Layering	Separate layers for content, presentation and site structure must exist in the CMS	✓	
Workflow	Content must be able to go through a workflow process	✓	
Sign-off	All content must go through a sign-off process	✓	
Templates	The CMS will be able to handle multiple templates		✓
Roles-based security	There are assignable roles for each stage of the workflow process		✓
Back office integration	The CMS will integrate into the current office environment	✓	
Output channelling	Content within the CMS will be outputted to various formats	✓	
Change independence	Each change to content is independent of all other changes	✓	
Asset management	Associated files can be stored with the content in the CMS		✓
Versioning	Versions of content are stored at each stage of the approval process	✓	
Rollback	Past versions (rollbacks) of content can be retrieved from the CMS	✓	

Standards compliance	Outputs from the CMS comply with current standards	✓	
Staging	Content can be viewed and tested prior to live delivery	✓	

9.2 **Browser**

Facility	Event	Mandatory	Desired
Browser integration	The CMS integrates into the current web browser environment	✓	

9.3 **Pricing**

Facility	Event	Mandatory	Desired
Pricing model	A model where a flat fee for unlimited end-user licenses can be issued		✓

9.4 **Integration**

Facility	Event	Mandatory	Desired
Monash LDAP Directory Server	User authentication using LDAP Directory (username / password)	✓	

9.5 **Security**

Facility	Event	Mandatory	Desired
Password transaction	All password related transactions must be via a secure encrypted channel. There must be no plain text password communications.	✓	