

Cape Gateway Content Management System User Requirements Specification (CMS URS), version 1

1. Introduction

1.1 Version Control

VERSION	DATE
1	20 September 2002

1.2 Purpose and Inputs

This document details the user interface (UI) for the Cape Gateway Content Management System (CMS). It specifies how the functionality described by the *Content Management System Functional Design Specification (CMS FDS)* is to be translated into a UI. The aim of this UI design is to enable a user to achieve their goals/tasks most directly and ergonomically.

This document assumes that the reader has read the CMS FDS, and is familiar with the concepts and functionality described there in.

The *Cape Gateway Portal Content Data Model* should also be read before reading this document.

The *Technical Platform Specification*, describes the environment that the UI specified in this document must operate in.

This document replaces, and makes redundant, the earlier *Cape Gateway Content Management System User Interface (a paper prototype)*.

1.3 Variances between FDS and URS

Where there are variances between the FDS and URS, follow the URS.

Some specific variances are noted here (not *all* variances have been noted).

1.3.1 Name Changes

1.3.1.1 Classes/Types

What the FDS referred to as CMS Classes are now Types. Types are divided into Content Types (most commonly accessed forms for content input) and Base Data Types (forms to input content that generally make-up the list items for the drop-down menus of the Content Type forms).

CONTENT TYPES		
NEW NAME	OLD NAME	COMMENTS
General Publication	Information Documents	
Legislation	Legislation	
Annual Publication	Annual Plan	
Job Ad	Job Advertisements	
Service	Service Products	
Project	Projects	
Tender Ad	Tender Adverts	
News	-	addition
Speech	-	addition
Official Contact	Official Contacts	
Legislative Event	Legislative Events	
Recreational/Cultural Event	Recreational/Cultural Events	
Other Event	Operational Events	
Glossary Entry	Glossary	
Facility	Facilities	
Committee	Committee	
Seat	Seat	
Key Measurable Objective	Objectives	
Public Entity	Public Entity	
External-Organisation Representative	(External Stakeholders)Representatives	
External Organisation/Individual	(External Stakeholders) Organisations or Individuals	
GSC	(Admin/Political) Category	
GSC Instance	(Admin/Political) Component	
Legislation Process	Legislation Process	delete

BASE DATA TYPES		
NEW NAME	OLD NAME	COMMENTS
Product Category	Product Categories	
General-Publication Type	Publication Categories	

Annual-Publication Type	-	addition
Project Category	Project Categories	
Facility Type	Facility Category	
Public Entity Type	-	re-introduction
Location Category	Location Categories	
Tender Category	Tender Categories	
Event Type	Event Categories	
External Stakeholder Type	External Stakeholder Categories	
Legislation Type	-	addition
Service Process Type	Service Process Types	
Official-Contact Type	Official Contact Type	
Event Type	Event Types	
Position	Position	
Project Status	Project Status	
GSC Type	Component Type	
Political Party	Political Party	
Portfolio	Portfolio	
Realm	Realm	
Constituency	Constituencies	
Information Source	Information Sources	
Tender Address	Procurement Sites	moved from content type list
Location	Locations	
Property	Properties	
Procurement/Tender Value Band	Procurement Process and Value Bands	
Taxonomy	Content Taxonomy	
Base Taxonomy	Base Taxonomy	
File Format	File Format	publishing system to deduces this
Tender Status	Tender Status	manage outside of CMS
Property Status	-	addition -manage outside of CMS
Post/Seat Status	-	addition -manage outside of CMS

Government Tier	Government Tier	manage outside of CMS
Portal Content Class	Portal Content Class	manage outside of CMS
User Role	User Roles	manage outside of CMS
Language	Languages	manage outside of CMS
Content Component Type	Content Component Types	delete
User Administration	User Administration	taken care of elsewhere in CMS

1.3.1.2 States

The names of states have been adjusted for consistency:

STATES	
OLD NAME	NEW NAME
Draft	Draft
Awaiting Comment	Comment Pending
Editor Pending	Editor Pending
Pending Authorisation	Authorisation Pending
Authorised	Authorised
Pending Release	Release Pending
Live	Live
Suspended	Suspended
Scrapped	Deleted

1.3.2 Re-Allocating Editorship

The CMS FDS (8.5.1) specifies:

"A custodian that is further up the custodian hierarchy may access a content item that is in any state and re-allocate editorship, except if the content item is locked by another editor who is currently editing it. An error message should indicate this."

Although the re-allocating itself is fairly easy to facilitate from a UI perspective, it results in a web of extra complexity...

There would need to be messages produced by the system to alert the current editor that the content item has been reassigned (i.e. that it is now sitting in his 'Out for Editorship' folder, or if reassigning is to be automatic, that the content item has disappeared completely from his folders!).

As the application has stayed away from internal messaging, this approach is taken here – if a custodian wants a content item reassigned she makes her instructions through other channels than the CMS (e.g. email, phone).

1.3.3 Scrapped/Deleted Items

The FDS specified that items would never be deleted from the repository, they would only ever move into a Scrapped state.

Now items on which a 'Delete' command is performed, are moved to the user's 'Deleted Items' folder. If an item in this folder receives a 'Delete' command, then it is permanently deleted.

1.3.4 Email Addresses Report

This report was not specified in the FDS, it is added and specified here.

1.3.5 Language: Key Identifying Attribute and Key Attribute

From a system perspective the Language of an item is seen as a key identifying attribute (KIA). From a UI perspective language is seen as a separate attribute, to the attributes that are grouped together under what the UI names: Key Attributes. This is as all types have a Language, but different types have different Key Attributes. To get a better understanding of this, see how the find criteria are split in the 'Find' window.

1.4 Mock-Ups

The mock-up images of the application's windows (see Appendix A) contain a lot of the UI specification, that is not explained *ad naseum* in this text – the old adage: A picture is worth a thousand words. As such the mock-ups are not to be viewed purely as illustrations of this text, but need to be examined in detail as information in addition to this text. It is recommended that the appropriate image is examined when reading the pertinent section of text.

The mock-ups have been populated with example content. It was attempted to make these examples as accurate as possible, but due to the present stage of the Cape Gateway Project, this was not always possible. An example of this are the values for 'Code' (UID) – the actual format of the UID is expected to come out through discussions during the CMS development phase.

1.5 Usability Requirements for CMS Users

Although not strictly part of the specification for developing the CMS application, these requirements for the success of the application are noted here:

- All new users must undergo training in how to use the CMS.
- Web authors and custodians must have enough time available to perform their web-author/custodian functions.
- Regular users (on average more than two inputs per week) must have fast machines, and good bandwidth.
- Users require a minimum monitor resolution of 800x600.

1.6. Application Name

The application will receive branding and a name. For now it is called by its generic application type: 'the CMS'. This is temporary.

Illustration: 'Acrobat' is the name of an application of the generic type 'PDF Viewer'.

1.7 Naming Conventions

The copyright symbol © is used in this document to indicate a feature only available to users who are custodians.

CMS – Content Management System

KIA - Key Identifying Attribute

UI- user interface

GSC – government structure component (see Data Model)

2. General Functionality

2.1 User's Name, Username and Password

A user recognises other users in the system by their name – first name and surname, e.g. Chris Higgo. If two or more users have the same name, the users can decide between themselves how to differentiate their display names. E.g. they could use their middle names: user 1 – Chris Higgo, user 2 – Chris Howard Higgo; or they could append their organisation: user 1 – Chris Higgo (KEEG), user 2 – Chris Higgo (Bridges). Each user's display name must be unique. This, as well as a check for duplicate names, is provided for in the New User process.

The system recognises users by their unique Login (Username and Password). A Username or a Password does not have to be unique, but the Username and Password combination needs to be unique. Usernames and Passwords are NOT case sensitive.

The Username is derived from the user's first name and surname, and is in lower case – e.g. Chris Higgo's Username would be: chiggo

If user has entered a middle name, Username is still derived only from first name and surname.

2.2 Login, Logout, and Automatic Logout

Users need to login to commence use of the application.

There is no explicit way to logout of the CMS. The user is logged out when they exit the application.

But there is an automatic logout. If a period of 15 minutes or more of no user activity (on the computer, not just the application) is registered, then on next user's activity on the application (except 'Exit' command, and all items under Help menu) the user will need to log back in (bring up 'Log Back In' window), continuing from exactly where she left off.

2.3 Installation

It is envisioned that users will download the application, or the installer for the application, and future updates, from a web site. If a software installation process is required, it should employ a standard method, and be straight forward to non-technical users.

2.4 Version Checking

It is important that the user base employs the latest version of the application. After a successful login, but before the user gains access to the application, a version check needs to occur, comparing the user's CMS version number, with the latest version number. If not the latest version, then bring up Alert 16

2.5 Sorting on Names

Throughout the application, lists of items can be sorted by columns. When a column contains users' names, sorting occurs (ascending or descending) alphabetically on the **first name**.

2.6 Expanding Areas

Certain windows have expanding areas – on a user action, an additional chunk of information needs to be displayed, between existing information already displayed. The existing information needs to move down, allowing for the insertion of the additional information.

An example illustrates this best. A General Publication content type allows for the entry of a document in sections. After having completed entry of section 1, the user clicks 'Add Next Section' button, to bring up another set of fields in the form for entry of section 2. All other fields at the bottom of the form need to move down as a result.

Another example are the 'Key Attributes' criteria on the 'Find' window. On selecting this criteria (by a checkbox), the window expands to display the particular Key Attributes for the content or base data type selected.

A working similar example is to be found in the Windows 2000 'Search for Files or Folders', when clicking on the 'Date' checkbox on Search Options.

2.7 Conditional Areas

Certain functionality only becomes operable when certain criteria are met. This is also referred to as functionality that is 'greyed-out' (because of the standard visual clue used by most applications). Often employed for the reason of preventing the user from performing an action that will result in the system having to notify them that nothing has happened, as there was nothing to perform the action on.

For example:

The 'Find' button on the 'Find' window will only become operable once a user has selected some criteria for a find.

The 'OK' button on the 'Placement' window will only become operable once a folder has been selected for the positioning.

The 'New Password' field on the 'Edit My User Details' window will only become available for input, once the 'Change Password' checkbox has been checked.

2.8 Autocomplete

In most cases where a user is entering the name of another user (for Editorship, Authorisation, Comments, etc.), there is autocomplete functionality. The user begins to type the first letters of the name of the person they want, the application autocompletes the name as the user types, selecting first from the most commonly used names by that user.

A working similar example is to be found in Novell's application GroupWise.

2.9 Dynamically Build Menu List Items

The contents of menus will in some cases need to be built as the result of a user's earlier decisions. This must happen in the system response times specified (see section **6 System Response Times**).

2.10 Drag and Drop

Standard Windows-OS drag and drop functionality is to be employed as a way for users to achieve a task (in addition to achieving task via application-menu commands, contextual-menu commands, toolbars, and keyboard shortcuts). E.g. a user could drag an item from her 'Drafts' folder into her 'Out for Authorisation' folder, as a way to execute the 'Send for Authorisation' command.

2.11 Keyboard Shortcuts

To facilitate rapid input, expert users of the CMS will migrate from using the mouse as the primary device to select commands, to using the keyboard. Keyboard shortcuts for commands are required. Throughout the 'Tab' key moves the point of input from current input field, to next input field.

2.12 Unnoticeable Refreshing

Any refreshing of a window needs to be achieved unnoticeably to the user. E.g. sorting a list by a column should not result in a visible flash (or even worse, a slower refresh visibly reloading the window). This type of visual interference with the user's task is distracting.

2.13 Placement of Input Indicator

Throughout where a window has input fields, put input indicator in first field (if this is a text box). I.e. the user does not have to take the additional step of selecting the first field in a form, and then begin typing, the field is ready to accept input.

2.14 'Complex Selects'

What the CMS FDS refers to as 'complex selects' are handled in the UI in one of two ways:

- If the entry required is a user's name or GSC, then the text field allows for auto-completion. If a value is entered that is not on the list of possible values for that field, the user will be alerted during validation. The user can also use the 'Look Up' button to bring up the 'Look Up' window, where she can select a value by looking through the entire list of possible values, or filter the list by various criteria.
- Other entries have a drop-down menu, listing all the values. As this a *very* long list for entries that are complex selects, probably unmanageably long, the user can use 'Look Up' button to bring up the 'Look Up' window, where she can select a value by looking through the entire list of possible values, or filter the list by various criteria.

2.15 User Role Visually Indicated

Throughout the UI the role of a user is visual indicated by colouring the user's name. A custodian's name appears in red (HEX value: #FF0000), a web author's name in black.

2.16 © Email Notification for Items to be Authorised

Custodians have the option to be notified when an item has been sent to their 'In for Authorisation' folder (see 'New User' and 'Edit User's Details' windows). If this option is checked the custodian will receive an email, every time an item is sent to them for authorisation. See Appendix F, Email 3.

3 Commands and Application-Menus

The following are the commands that can be performed on objects. Commands are selectable from the application-menus, as well as (some) from the toolbar on the Item window. Commands are grouped here by application-menu.

Commands will at times be inactive (greyed-out). In some cases this has been specified below, but this is not meant to be an exhaustive list. The complete list will need to come out through the development process.

The commands are also accessible through keyboard shortcuts. Apply standard Windows-OS methodology to ascertain these (e.g. shortcut for File menu is Alt + F, for Select All is Ctrl + A). Default display of menus is shortcuts OFF (i.e. no display of underlining); 'Alt' key will toggle the display of shortcut underlining on/off.

The application has context-sensitive/contextual menus (right-clicking on an object). The list of commands in each contextual menu, for each item, will need to come out through the development process.

The commands that are for custodians only, should not appear in the web author's view of the application-menus. I.e. don't include them permanently greyed-out for web authors - don't display them at all.

3.1 File

3.1.2 New

Select from 'Content Item', 'Base Data Item', or © 'User'.

Selecting 'Content Item' gives choice of all content types, selecting one will bring up the 'Item' window, with the particular form of the content type selected.

Selecting 'Base Data Item' gives choice of all base data types, selecting one will bring up the 'Item' window, with the particular form of the base data type selected.

© Selecting 'User' brings up the 'New User' window.

3.1.3 Open

Performed on objects (items and users), it opens them in their appropriate window.

3.1.4 Close

Closes a window. If closing an 'Item' window, and changes have been made to the item, and not saved, bring up Alert 4.

3.1.5 Save

Saves an item.

3.1.6 Page Setup

Calls the standard Windows interface Page Setup window and functionality.

3.1.7 Print

Calls the standard Windows interface Print window and functionality.

3.1.8 Report

Select from: Content & Base Data, Users, User Tree, Email Addresses, Tenders Invited, Tender Address List, Tenders Awarded, Tenders Cancelled, Multiple Concurrent Logins, System Downtime, Portal Statistics.

Each calls the appropriate window, except System Downtime and Portal Statistics, they point to URLs, and should run the user's default WWW browser, and load the URL.

3.1.9 Exit

Exits the application.

3.2 Edit

3.2.1 Undo

This will display in the application-menu appended with the command it will undo – e.g. Undo Typing. This command will undo the user's last action. 'Can't Undo' is also a valid value here.

The functionality of multiple undos is to be aimed for.

3.2.2 Redo

This command is paired with 'Undo' – it undoes an undo.

Will display in the application-menu appended with the command it will redo – e.g. Redo Typing. This command will redo the user's last 'Undo' action.

If there is only one level of undo, then this command as a separate item on the menu is obsolete. Instead it toggles with Undo.

3.2.3 Cut, Copy, Paste

Standard functionality

3.2.4 Select All

This selects all items selectable. The items are different in different contexts. E.g. in the right-hand pane of the 'Job Queue' window it would select all the items, in the 'Item' window it would select all the text filled-in by the user (if any).

3.2.5 Delete

On selected texts it deletes the text. On a selected content or base data item, it moves the item to the user's 'Deleted' folder. But this command is only active for items that user is the editor of. If this command is performed on an item already in the 'Deleted' folder, then it is permanently deleted.

NOTE: this command *cannot* be performed on users, deleting a user is accomplished (by custodians only) with the 'Delete' button on the © 'Edit User's Details' window.

3.2.6 Find

Brings up the 'Find' window, defaulting display to the 'Find' tab.

3.2.7 Find Duplicates

This command only becomes active when a user is in an 'Item' window, and has filled in one or more KIAs (as Language is a KIA and always has a default selection, this command always becomes active when a user is in an 'Item' window).

The command is basically the same as a 'Find', with the application filling in the criteria for: language, type and key attributes.

If there is only one match, then the form fields on the 'Item' window where the command was performed from, get filled-in with the match.

If there are several matches then the 'Find' window comes up, defaulting to display on the Results tab, with the list of results. If the user double-clicks, or performs an 'Open' command, on an item in the list of results, then the form fields on the 'Item' window where the 'Find Duplicates' command was performed from, get filled-in.

NOTE: this only applies to the 'Find' window when accessed via the 'Find Duplicates' command.

NOTE: if the user selects the 'Find' tab of the 'Find' window during this process, they will see the criteria for the find filled-in.

3.2.8 © Edit User's Details

Brings up the 'Edit User's Details' window. If a user is selected (from a list in any window where this kind of information is displayed) when this command is performed, that user's details are filled-in in the window. Else the user performing this command, must subsequently select a user via the 'Edit User's Details' window.

3.2.8 View User's Details

Brings up the 'View User's Details' window. If a user is selected (from a list in any window where this kind of information is displayed) when this command is performed, that user's details are filled-in in the window. Else the user performing this command, must subsequently select a user via the 'View User's Details' window.

3.2.9 Edit My User Details

Brings up the 'Edit User's Details' window, with the logged-in user pre-selected as the user to view.

3.3 View

3.3.1 Preview

Active when a content or base data item is selected, or from an 'Item' window. This generates an HTML file, which is a summary of the input of the item, including the HTML the user has added. The command runs the user's default WWW browser to display the file, and the user thus gets a preview of the display of the HTML they have entered.

The file is temporary and does not need to be saved (although the user could always perform a 'Save As' command from within the browser, if they wanted to save the file for whatever reason).

See Appendix C for the layout of a preview.

NOTE: This preview is NOT meant to be an exact preview of the item as it will appear on the portal. In many cases types do not have a singular portal template, and some portal templates are made up of many types. The aim of the preview is for users to check the effects of their HTML coding.

3.3.2 Comments

Active when a content or base data item is selected, or from an 'Item' window. Brings up the 'Comments' window, defaulting display to the 'View' tab, displaying any comments entered about that item.

3.3.3 History

Active when a content or base data item is selected, or from an 'Item' window. Brings up the 'History' window, displaying the lifecycle of that item, including all versions.

3.3.4 Switch User View

User selects between her name, and 'Other'. The selection is either-or, so mark the current value with the Windows standard • indication. By default, on logging-in, the view is set to the logged-in user. If 'Other' is selected the 'Switch User View' window comes up, where the user can select a user who's job queue they wish to view in read-only mode. This is a read-only view of that user's job queue. No commands can be performed on the viewed-user's items (or on behalf of the viewed-user) , but the job queue folders can be navigated (in order to view their contents), and items can be opened in read-only format. This is simply a view alteration - the user is NOT temporarily logged in as another user.

NOTE: this command can also be invoked by double-clicking on an item in the 'State' or 'No. of Items' columns in the results on the 'User Report' window

3.3.5 Next, Previous

These commands move the user's selection from an item to the next/previous item in the list.

3.3.6 Sort By

The user selects the column they wish a list to be sorted by, and the sort is performed. The user can also select here whether the sort is ascending or descending.

The selection is either-or, so mark the current value with the Windows standard • indication.

3.4 Item

3.4.1 @ Authorise

This command authorises an item (changes its state to Authorised).

First though, a validation check is performed (as the custodian may have edited the item, or she may have authored it and set herself as the custodian).

If item validates, it leaves the custodian's 'In for Authorisation' folder (or which ever folder it was in – a custodian may author a new item, set herself as the custodian, and then authorise it). If the item was open (i.e. displayed in an 'Item' window), and this command is performed, the 'Item' window in question closes.

3.4.2 @ Reject

This command rejects an item that was sent for authorisation (changes its state to Editor Pending).

The item leaves the custodian's 'In for Authorisation' folder, and shows up in the editor-who-sent-it-for-authorisation's 'Returned from Authorisation' folder. If the item was open (i.e. displayed in an 'Item' window), and this command is performed, the 'Item' window in question closes.

There would be no point in a custodian authoring an item, setting herself as the custodian, and then invoking 'Reject'. To stop the user doing something silly like this, the 'Reject' command is only active for items that have had a 'Send for Authorisation' command performed on them.

3.4.3 Send for Authorisation

Sends an item for authorisation. First though, a validation check is performed. If item validates, it moves to the user-who-invoked-this-command's 'Out for Authorisation' folder, and appears in the user-selected-as-the-custodian's 'In for Authorisation' folder. If the item was open (i.e. displayed in an 'Item' window), and this command is performed, the 'Item' window in question closes.

This command is inactive if the user entered in the 'Editor' field is NOT the logged-in user.

3.4.4 Send for Comment

Sends an item for comment to the users entered in the 'Commentators' field. The item moves to the user-who-invoked-this-command's 'Out for Comment' folder, and appears in the users-selected-as-commentators' 'In for Comment' folders. If the item was open (i.e. displayed in an 'Item' window), and this command is performed, the 'Item' window in question closes.

NOTE: no validation check is required at this point – users can send partially finished items for comment. Do check though that there are users entered in the 'Commentators' field!

3.4.4 Send for Editorship

Sends an item for editorship to the user entered in the 'Editor' field. The item moves to the user-who-invoked-this-command's 'Out for Editorship' folder, and appears in the user-selected-as-editor' 'In for Editorship' folder. If the item was open (i.e. displayed in an 'Item' window), and this command is performed, the 'Item' window in question closes.

To stop the user sending the item to herself for editorship, this command is only active if some other user than the sending-user is entered in the 'Editor' field.
NOTE: no validation check is required at this point – users can send partially finished items for editorship. Do check though that a user is entered in the 'Editor' field!

3.4.5 Move to Drafts

Moves an item from any of the other job queue folders to the 'Drafts' folder. This innocuous-sounding command, has quite a few consequences, as it changes the item's state to Draft (if its state is not already Draft)...

If the item is in a '**Returned from Authorisation**', '**Returned from Editorship**', or '**Deleted**' folder, it simply moves to 'Drafts' folder.

If the item is in a '**In for Editorship**' folder, it moves to 'Drafts' folder. The user is accepting editorship by using this command, and her name is now in the item's 'Editor' field.

If the item is in a '**Out for Authorisation**', '**Out for Comment**', or '**Out for Editorship**' folder, it moves to 'Drafts' folder, but also retracts the item from Authorisation/Comment/Editorship; i.e. it moves out of other users' 'In for Authorisation', 'In for Comment', or 'In for Editorship' folders.

If the item is in a '**In for Authorisation**' folder, it moves to 'Drafts' folder, but also moves out of the editor-who-sent-it's 'Out for Authorisation' folder. The custodian has taken on editorship by this action, and her name is now in the item's 'Editor' field.

If the item is in a '**Suspended**' folder, it moves to 'Drafts' folder. The custodian has taken on editorship by this action (if she was not already the editor of the suspended item), and her name is now in the item's 'Editor' field.

If the item is in a '**In for Comment**' this command is inactive.

3.4.6 Related Items

This command enables the user to link other items that are related to item she is working on, that she thinks will be useful to portal users reading the item. On the portal this was implemented by displaying hyperlinks to the related items from the page displaying the original item.

Active when a content or base data item is selected, or from a 'Item' window. This brings up the 'Related Items' window.

3.4.7 Placement

This command enables the user to assign a place for an item in the structure of the portal. E.g. to place a piece of content about farm safety onto the portal at the location Your Life > Crime & Safety > Rural. Some types get automatically assigned a placement (these rules to be developed in the Portal Specifications); assigning Placement here, is in addition to automatically assigned placements. But there is no need to display the automatic assignments through the CMS UI.

Active when a content or base data item is selected, or from an 'Item' window. This brings up the 'Placement' window.

3.4.8 Translations

This command enables what the CMS FDS refers to as “language synchronisation”. A user would invoke this command when she knows that the item she is working on has a translation already in the CMS. All translations need to have the same code in order to be linked. So this command brings up a window, where a new Code (the Code of the existing translation) can be entered for the item.

Active when a content or base data item is selected, or from a ‘Item’ window. This brings up the ‘Translations’ window.

3.4.9. Add Comment

Active when a content or base data item is selected, or from a ‘Item’ window. This brings up the ‘Comments’ window, defaulting display to the ‘Add’ tab.

3.4.10 Decline Editorship

Active when a content or base data item, which has been sent to the user for editorship, i.e. is in their ‘In for Editorship’ folder, is selected, or from a ‘Item’ window (where likewise the item is in ‘In for Editorship’ folder).
The item leaves the user’s ‘In for Editorship’ folder, and shows up in the editor-who-sent-it-for-editorship’s ‘Returned from Editorship’ folder. If the item was open (i.e. displayed in an ‘Item’ window), and this command is performed, the ‘Item’ window in question closes.

3.4.11 © Suspend

This command suspends an item that has been previously authorised (changes its state to Suspended), suspending its display on the portal.

The item now appears in the custodian’s ‘Suspended’ folder.

This command is only active for items that are in an Authorised state (including Release Pending and Live).

Active when a content or base data item is selected, or from a ‘Item’ window.

3.5 Format

3.5.1 Bold

This inserts the (X)HTML tags and on either side of the selected text. The tags appear in blue (R: 0, G: 0, B: 128). If no text is selected insert the tags on either side of the text-input-indicator (|).

If text is selected that has been bolded, and the ‘Bold’ command is performed on this text, the tags are removed – i.e. it is a toggle.

Indicate on the application-menu when a selection of text state is ‘bolded’, by the Window’s standard of a tick (✓) preceding this command.

3.5.1 Italic

This inserts the (X)HTML tags and on either side of the selected text.

The tags appear in blue (R: 0, G: 0, B: 128). If no text is selected insert the tags on either side of the text-input-indicator (|).

If text is selected that has been italicised, and the 'Italic' command is performed on this text, the tags are removed – i.e. it is a toggle.

Indicate on the application-menu when a selection of text state is 'italicised', by the Window's standard of a tick (✓) preceding this command.

3.5.2 Paragraph Break

This inserts the (X)HTML tags <p> and </p> on either side of the text-input-indicator (|). Or, if a range of text is selected, it inserts the tags at the beginning and end of the selection. The tags appear in blue (R: 0, G: 0, B: 128).

3.5.3 Line Break

This inserts the XHTML tag
 . Or, if a range of text is selected, it inserts the tag at the end of the selection. The tag appears in blue (R: 0, G: 0, B: 128).

3.5.4 Hyperlink

Active when a range of text is selected. This brings up the 'Hyperlink' window.

The user enters a URL via this window, and on Click 'OK', the (X)HTML tags and are inserted on either side of the selection. The tags appear in blue (R: 0, G: 0, B: 128).

3.5.4 Email Link

Active when a range of text is selected. This brings up the 'Email Link' window.

The user enters an email address via this window, and on Click 'OK', the (X)HTML tags and are inserted on either side of the selection. The tags appear in blue (R: 0, G: 0, B: 128).

3.5.5 List

Active when a range of text is selected. The user can choose from either 'Bulleted List' or 'Numbered List'

If '**Bulleted List**': The (X)HTML tags and are inserted at the beginning and end of the selection, and and are inserted at the beginning and end of each carriage-return within the selection.

If '**Numbered List**': The (X)HTML tags and are inserted at the beginning and end of the selection, and and are inserted at the beginning and end of each carriage-return within the selection.

3.6 Window

This menu lists all the windows, by their title, that the application has open. They are listed in the order they were opened, except for 'Item' windows, which are grouped

together at the end of the list (this group also listed in order opened). A number, starting with 1, is prefixed onto each window name in the list (to be used as keyboard shortcut).

The current/active window has a • indication.

Selecting a window here, brings it up as the current/active window.

3.7 Help

3.7.1 Help, Word Standards, Content Type Examples, Useful HTML Tags, Writer's Guide, Content Management Policy

Points to an URL (each one to a different URL), and should run the user's default WWW browser, and load the URL.

3.7.2 About <CMS_name>

Brings up 'About <CMS_name>' window.

4 Primary Windows

4.1 Job Queue

This window comes up after a successful login, defaulted to displaying the 'Drafts' folder open.

Folders are used to organise the user's workflow of content items. The metaphor of In and Out workflow has been adopted. This highlights items that require active attention, and those that require passive attention. It also makes it clear to the user which items are "theirs". The metaphor is continued in the application-menu commands: Send for Authorisation/Comment/Editorship

Information displayed in the right-hand window pane, for each folder (column names in bold are the default sort, descending, for that folder):

Folder	Information displayed & column names, from L to R
Drafts	Type, Label, Custodian, Modified
Returned from Authorisation	Type, Label, Custodian, Received
Returned from Editorship	Type, Label, Custodian, Received
In for Comment	Type, Label, Editor, Custodian, Received
In for Editorship	Type, Label, Editor, Custodian, Received
Out for Authorisation	Type, Label, Custodian, Sent
Out for Comment	Type, Label, Awaiting[#], Commented[#], Sent
Out for Editorship	Type, Label, Pending Editor[name], Sent

Deleted	Type, Label, Custodian, Modified
© In for Authorisation	Type, Label, Editor, Received
© Suspended	Type, Label, Editor, Custodian, Suspended

The list of the items is sortable by any column, ascending or descending, by clicking on column to make it the column sorted by, or clicking on it again to toggle between ascending/descending.

A user can drag an item from one folder to another, where appropriate (i.e. CANNOT drag an item into 'Returned from Authorisation' or 'In for Comment' or 'In for Editorship'). Use standard windows drag and drop interface technique – i.e. translucent item attaches itself to cursor, folders that can be dropped into become selected as moved over, folders that cannot be dropped into become selected, but cursor turns into a no-entry sign.

See the appropriate command (Send for Authorisation/Comment/Editorship or Move to Drafts) for consequences of item's move.

Items that are deleted move to the 'Deleted' folder, if an item in this folder is deleted, then it is permanently deleted.

If user opens an item that is in his 'In for Editorship' folder, and

1. makes any changes to the content, and then saves it, he has accepted editorship, his name is filled-in in the 'Editor' field, and the content moves into his 'Drafts' folder
2. makes any changes to the content, and then sends for authorisation or comment, he has accepted editorship, and his name is filled-in in the 'Editor' field.
3. changes the name in the 'Editor' field to his own name, and then saves it, he has accepted editorship, and the content moves into his 'Drafts' folder on saving (this is really the same as 1. above, as a change has been made to the content).
4. selects 'Move to Drafts' from the application-menu, or drags and drops it into his 'Drafts' folder, his name is filled-in in the editor field, and the content moves into his 'Drafts' folder.

When this window is viewed in read-only mode (e.g. by a 'Switch User' command), the user's name at the top of the tree that is being viewed, is appended with " – READ-ONLY", e.g. Chris Higgo – READ-ONLY

4.2 Item

This window is used for the creation of new content and base data items, as well as for the display of existing ones.

Window title naming: insert the content/base data type selected, followed by a colon (e.g. General Publication:). As the item's label constituents are being entered, append them to the existing (partial) title (e.g. General Publication: Farm Safety).

The content of this window is the form related to the content/base data type selected – see Appendix B

The form is visually broken up into its constituent parts using colour. In cases where additional parts can be added/expanding areas (e.g. General Publication, adding another section), the additional part's colour is the alternate of the preceding part – i.e. alternate between grey and white.

The items (if any) listed under 'Translations' and 'Related Items' are hyperlinked – clicking on one will bring up a new 'Item' window, displaying that item.

On 'Send for Authorisation', validate form to see if all mandatory fields have been entered. If not pop up an alert, and visually highlight the field labels that are still outstanding in red. Validate also for the specific entry-format requirements of some fields (the list of what these are will need to come out through the development process).

Validation occurs only on Send for Authorisation. The item does NOT require validation for Send for Comment/Editorship.

The Language field always defaults to user's previous language selection (not form specific).

The system performs an **invisible background search** after user has entered all KIAs of the item, to see if any items in the database match – if yes then popup Alert 1.

The 'Commentators' field in the header information, is where a user can add users that she wants comments from. Those commentators who have already commented get (!) appended to their name – e.g. Chris Higgs(!) .

The Code (UID) of an item is displayed here as soon as it is assigned (development to determine if this is on saving the item for the first time, or on creating a new item).

NOTE: a user can assign a Code through the 'Translations' command.

In the case of a new item, the 'Editor' field defaults to the user. And the 'Custodian' field initially to his parent custodian. If the user changes the Custodian to another user, then thereafter that user becomes his default custodian for the 'Custodian' field. (This only applies to 'Custodian' field, NOT 'Editor' field.)

An item sometimes needs to be displayed in a read-only mode. This is when it is being viewed by a user who is not its editor. This would be the case of a commentator, or when a 'Switch User View' command has been performed. In read-only mode, no changes can be made to any of the fields.

NOTE: a custodian who has been sent the item for authorisation, would see it in normal editable mode, as editorship is passed to the authorising custodian.

The **toolbar** on this window contains icons for the commands:

Save, ©Authorise, ©Reject, Send for Authorisation, Send for Comment, Send for Editorship, Related Item, Placement, Translation, Add Comment, Decline Editorship, Find, Find Duplicates, Preview, View Comments, Delete, Bold, Italic, Insert Paragraph Break, Insert Line Break, Insert Hyperlink, Insert Email Link

Toolbar requires functionality to display icons with: MouseOff state, MouseOver state, MouseDown state, active, inactive, and tooltips (pop-up window with text description of command the icon implements). For the display of these use MS Office conventions (e.g. MouseOver state is icon with bevelled square around it). The icons will be inactive/active as determined by when their commands in the application-menus are inactive/active.

Some of the text users enter into the text boxes in the forms will be **HTML tags**. The application needs to recognise these as such, and mark them in blue (R: 0, G: 0, B: 128), to distinguish them for the user's sake from the rest of the entered text. The implementation of this can be relatively simple: when a < character is typed, make it blue, and all following text, up to an including the character >, then back to black text. Care needs to be taken to allow for user editing recursively, e.g. missing the tag's opening <, typing on, closing with a > (so far everything in black text), then realising mistake, going back and adding the opening <. At which point the application needs to look forward, making the tag blue.

Using < and > as indicators to the application for HTML tags, does not remove these characters from the user's repertoire for non-HTML purposes, as the user should enter these characters as < or < and > or > respectively, in any case.

4.3 Comments

The command 'Comments' will bring this window up displaying the 'View' tab. Comments are displayed by order of date/time added (earliest first). The user's email address is hyperlinked – onClick will run user's default email client, bringing up a new mail message, with the addressee filled-in.

The command 'Add Comment' will bring this window up displaying the 'Add' tab. The 'Add Comment' button on this window is inactive until user entry in text box. onClick 'Add Comment' button switch to 'Comments' tab, displaying the comment the user has just entered (scroll to the right point in the list of all comments). The text field on the 'Add' tab is cleared.

onClick 'Add Comment' button, if the item commented on was in user's 'In for Comment' folder, then remove it from the folder. The user's name in the 'Commentators' field (on all windows applicable) will now be appear appended with (!) – e.g. Chris Higgo(!) . Update this on windows that are currently open.

onClick 'Add Comment' button, if the item commented on was NOT in user's 'In for Comment' folder, then add user's name to the list of users in the 'Commentators' field, appended with (!).

4.4 Find

When opened default display on 'Find' tab.

Key Attributes is greyed out until a Language AND Type selection is made. At that point if a user selects it as a criteria (checks the checkbox), the content below shifts down, and the relevant KIA field(s) appear.

onClick 'Find' button, the find begins. Switch cursor to egg-timer for duration of process. When results are returned, the application switches to the 'Results' tab, for their display. Keep the user-entered find criteria, in the 'Find' tab, in place, in case user wishes to return to refine criteria after viewing the results.

onDoubleClick an item in the results, display the item in a new 'Item' window (see 'Find Duplicates' command for exception to this'.

4.5 History

Some states do not have user associated with them, for these the User column entry displays a dash, indicating an entry here is not applicable.

As is the case throughout the application, the user's role is indicated by the colour of her name. Here though, this needs to be the user's role at that point in history (not as is at present – which may have changed). If this is too complicated from a development point of view, then use current user role.

4.6 Report Windows

4.6.1 Content & Base Data

4.6.2 Users

On 'Results' tab onDoubleClick on a user's name, bring up 'View User's Details' window, onDoubleClick on a user's last active, state, or number of items, bring up a 'Job Queue' window in read-only mode for that user.

4.6.3 User Tree

onDoubleClick on a user's name, bring up 'View User's Details' window.

4.6.4 Email Addresses

The results is listed in a comma delimited list (this is for easy copy and paste into email client 'To' field).

4.6.5 Tenders Invited

'Make File' button only becomes operable when one or more items have been selected. onClick will bring up the standard Windows-OS 'Save' window, and the user select where she wishes to save the file on her machine (see FDS for default file name). An HTML file is created incorporating the items selected. See Appendix E for the layout of the HTML file, and the HTML code.

'Make Address List' button would produce a file of the items selected, as for 'Tender Address List'.

4.6.6 Tender Address List

'Make File' button only becomes operable when one or more items have been selected. onClick will bring up the standard Windows-OS 'Save' window, and the user select where she wishes to save the file on her machine (see FDS for default file name). An HTML file is created incorporating the items selected. See Appendix E for the layout of the HTML file, and the HTML code.

4.6.7 Tenders Awarded

'Make File' button only becomes operable when one or more items have been selected. onClick will bring up the standard Windows-OS 'Save' window, and the user select where she wishes to save the file on her machine (see FDS for default file name). An HTML file is created incorporating the items selected. See Appendix E for the layout of the HTML file, and the HTML code.

4.6.8 Tenders Cancelled

'Make File' button only becomes operable when one or more items have been selected. onClick will bring up the standard Windows-OS 'Save' window, and the user select where she wishes to save the file on her machine (see FDS for default file name). An HTML file is created incorporating the items selected. See Appendix E for the layout of the HTML file, and the HTML code.

4.6.9 Multiple Concurrent Logins

When window opens, display tree open at current month, i.e. the newest folder.

The total number of multiple concurrent logins is displayed in brackets after each month, and also for each year.

Year and month display-order is most recent first.

onDoubleClick on a item in the right-hand pane, bring up 'View User's Details' (with that user selected).

4.7 © New User

When creating a user, the creator automatically become the parent custodian.

'Email notification for items to be authorised' option is greyed out until user role 'Custodian' is selected.

onClick 'OK' button system needs to do a check to see if the user already exists in the system. Do check on first name, surname and email address fields. Check either in background, once these fields have been filled-in, or onClick 'OK'. If the user does already exist bring up Alert 2

onClick 'OK' button, and the check returns no duplicates, an email gets sent to the new user, at the email address entered, with their login details. See Appendix F, Email 1.

4.8 © Edit User's Details (Edit My User Details)

The title of this window is 'Edit User's Details', but it covers two commands: the custodian-only command 'Edit User's Details', and the all-user command 'Edit My User Details'.

If the 'Edit User's Details' command brings up this window, then the 'Enter name of user to be edited' field is blank, and everything else below it is greyed-out. A user must first be selected to edit.

If the 'Edit My User Details' command brings up this window, the user's name is filled-in in the 'Enter name of user to be edited' field, and all the other fields are appropriately filled-in too. If user is a web author, the 'Enter name of user to be edited' field is read-only, and 'Look Up' and 'Find' buttons are greyed-out.

'Email notification for items to be authorised' option is greyed out unless user role 'Custodian' is selected.

If 'Send user a reminder of their Username and Password' option is selected, onClick 'OK', an email gets sent to the selected-user's email address, containing his user name and password. See Appendix F, Email 2.

onClick 'Delete User', pop up Alert 3. onClick 'Yes' of alert, close alert window, and this window

The 'Change My Password' checkbox option is greyed-out, unless the user selected to be edited is the same as the user doing the editing (more than likely this scenario was reached through the 'Edit My User Details' command). Selecting the checkbox makes the 'New Password' and 'Retype New Password' fields active. Password fields have password-format entry (i.e.: ••••••). onClick 'Save Changes' the user's login will change – run checks to see that the very rare scenario of two users with the same username having selected the same password, has not occurred.

4.9 View User's Details

The 'View User's Details' command, as well as double-clicking on a user's name in some lists that the application produces, brings up this window.

The 'Enter name of user to be edited' field is blank (unless this window was brought up by user double-clicking on a user's name in some lists that the application produces). A user must first be selected to edit. onClick 'View' button, user's details are displayed.

The viewed-user's email address is 'clickable' – onClick brings up user's default email client, with a new mail message, with viewed-user's email address as the addressee.

5. Secondary Windows

5.1 Splash

This comes up as the application is starting up. Only to be implemented if application takes longer than 2 seconds to start up – i.e. it is used as an indication to the user that they have run the application.

This 'window' disappears after successful login.

Alternatively combine this 'window' with 'Login' window, if 'Login' window can appear within 2 seconds of starting application running. To be discussed with developers.

5.2 Login

A Username and Password are required to login. The 'Username' field is automatically filled in with the last Username entered. If no match found with user entered login, bring up Alert 12.

A successful login brings up the 'Job Queue' window, defaulted to displaying the 'Drafts' folder open.

5.3 Log Back In

If a period of 15 minutes or more of no user activity (on the computer, not just the application) is registered, then on next user's activity on the application (except Exit command, and all items under Help menu) this window comes up. The 'Username' field is automatically filled in with the last Username entered.

A successful login continues the user from exactly where they left off in the application.

If no match found with user entered login, bring up Alert 12.

5.4 Hyperlink

Validate that the URL entered is an absolute URL. If not bring up Alert 13.

5.5 Email Link

Validate that entry looks like an email address – check for @. If not bring up an Alert.

5.6 Look Up

The contents of this window helps a user in complex select instances. It is called from a 'Look Up' button. The information (and therefore columns) it contains is different for each specific scenario – e.g. complex select could be for an Editor, or for a Custodian, or for a GSC, or for a Location, etc.

Each column in this window has an entry box, whereby the user can filter the entire list by that column. Entry here is case INSENSITIVE. Multiple filters can be applied – e.g. in the case of a complex select for an editor, 'ch' could be entered in the 'First Name' column, AND 'knowledge' could be entered into the 'GSC' column. The list would be filtered by BOTH of these.

When a user has selected an item in the list, the 'OK' button becomes active. onClick 'OK' the window closes, and the item is inserted into the field from where the 'Look Up' button was originally pressed.

5.7 Related Items

'Add' tab: As well as typing (or copy and pasting) a Code here, to add a related item, user can drag and drop an item from anywhere else in the application (e.g. from the results of a Find), into the text box, and its Code will come up.

If user adds items that have not been authorised, and the item that they were added to goes live, the unauthorised items that were added, are NOT displayed on the portal page. When/if they do become authorised, then they are displayed on the portal page.

'Remove' tab: items can be selected and removed by 'Delete' key, or 'Remove' button.

5.8 Placement

If the item has not been placed before, display the tree unexpanded (only top level folders). If there is/are existing placement(s), then display the tree expanded to the branch(es) where the placement(s) is/are.

Selecting a folder in the tree, changes its icon from closed to open. The 'Add' button becomes active. onClick 'Add' the item is placed, and a document icon appears to represent this. 'Add' button becomes inactive (an item cannot be placed twice in the same folder), and 'Remove' button becomes active.

An item can be placed in more than one location (added to more than one folder).

The user removes a prior placement by selecting it (the document icon), and then clicking 'Remove' button.

5.9 Translations

On opening, if there has been a prior link to a translation, then display that Code in the Code field.

As well as typing (or copy and pasting) a Code here, a user can drag and drop an item from anywhere else in the application (e.g. from the results of a Find), into the text box, and its Code will come up.

onClick 'OK', make sure the 'Code' field on all other windows open is updated.

5.10 Insert File

This window is called from a form ('Item' window), when user selects 'File' in the 'Format' field.

5.11 Uploading

This window comes up when a file is being uploaded to the content repository.

The standard Windows-OS window can be used here, as long as it caters for: filename of file being uploaded, a progress bar, and (estimated) time remaining.

5.12 Switch User View

This window is brought up by the 'Switch User View Other' command. Once a user's name has been entered, and onClick 'OK' window closes, the 'Job Queue' window changes to read-only mode, displaying the selected user's folders.

5.13 About <CMS Name>

credits, version, copyright information.
onClick 'OK' button window closes.

5.14 Alerts

Window title is <CMS name>. These are what Windows-OS refers to as message boxes. Categorise alerts into the Windows-OS standard of information, warning, and critical (with appropriate graphic). See Appendix D for some examples.

6 System Response Times

6.1 Network Environment of User Base

As it is envisaged that there will be a central repository where data will be stored, and the CMS is the tool to input data into this repository, some network functionality will be required by the CMS. The majority of the user base will be using the PGWC WAN, but a minority will be networking via the Internet. (See the *Technical Platform Specification* for details.)

6.2 Response Times

The Cape Gateway Development project has a user-centred design philosophy. Product design and development decisions are made for usability reasons. Sub-second system response times are crucial to usability.

The basic advice regarding response times has been about the same for almost thirty years [Miller 1968; Card et al. 1991]:

0.1 second is about the limit for having the user feel that the system is reacting instantaneously, meaning that no special feedback is necessary except to display the result.

1.0 second is about the limit for the user's flow of thought to stay uninterrupted, even though the user will notice the delay. Normally, no special feedback is necessary during delays of more than 0.1 but less than 1.0 second, but the user does lose the feeling of operating directly on the data.

10 seconds is about the limit for keeping the user's attention focused on the dialogue. For longer delays, users will want to perform other tasks while waiting for the computer to finish, so they should be given feedback indicating when the computer expects to be done. Feedback during the delay is especially important if the response time is likely to be highly variable, since users will then not know what to expect.

[J. Nielsen, Response Times: The Three Important Limits,
www.useit.com/papers/responsetime.html]

The following response times requirements are for the main user group - those networked via the PGWC WAN.

The CMS response to commands (e.g. clicking an 'OK' or 'Cancel' button, clicking on a menu to drop it down with its contents, opening a new window, sorting a list of results by a column, expanding a branch of a tree – see 'Placement' window) should ideally be ≤ 0.1 second. ≤ 0.5 second is acceptable.

The return of the results of any find functionality is excluded from this. Obviously the response time here needs to include time for additional system calculations, which varies according to the criteria of the specific search instance. As a guide total response time for any find (from user command, to system displaying results): ≤ 1 second.

If system response times should ever go over 1 second, the user requires feedback that the system has re-acted to the user's command, and is computing. The Windows UI standard of displaying the cursor as an egg-timer is to be used here. For some tasks (e.g. uploading a large file) a progress bar is required, to let the user know the system is busy with the task, and how far it is. Here the cursor can change to an egg-timer, or stay as a pointer, depending on whether the system allows the user to continue with other tasks, as the system completes the initial task in the background.

Appendix A: Mock-Up Images of Windows

These are files in gif format, accompanying this document. Find them in the Appendix_A folder.

Errata: throughout ignore the description of the application-menu (it is incorrect), instead apply as described in this document under section **3 Commands and Application-Menus**

PRIMARY WINDOWS			
Section	Window Name	Filename	Comments
4.1	Job Queue	JobQueue-custodian_default.gif	
		JobQueue-wa_default.gif	
4.2	Item	ContentItem_all.gif	ignore the icons on the toolbar - they are stand-ins at present, the complete list of icons is described here under 4.2 Item
		ContentItem_allmore.gif	
		ContentItem_default.gif	

		ContentItem_file.gif	
		ContentItem_text.gif	
		ContentItem_textmore.gif	
4.3	Comments	Comments-add_default.gif	
		Comments-view_default.gif	
4.4	Find	Find-find_default.gif	
		Find-results_default.gif	
4.5	History	History-default.gif	
4.6.1	Content & Base Data	Report-c&bd-find_default.gif	
		Report-c&bd-results_all.gif	
		Report-c&bd-results_default.gif	
4.6.2	Users	Report-users-find_default.gif	
		Report-users-results_all.gif	
		Report-users-results_default.gif	
4.6.3	User Tree	Report-usertree_default.gif	
4.6.4	Email Addresses	Report-email-find_default.gif	
		Report-email-results_default.gif	
4.6.5	Tenders Invited	Report-tendersin-find_default.gif	
		Report-tendersin-result_all.gif	
		Report-tendersin-result_def.gif	
		Report-tendersin-result_def.gif	
4.6.6	Tender Address List	Report-add_find_default.gif	
		Report-add_results_default.gif	
		Report-add_results_all.gif	
4.6.7	Tenders Awarded	Report-tendersaw-find_default.gif	
		Report-tendersaw-res_all.gif	
		Report-tendersaw-res_default.gif	
4.6.8	Tenders Cancelled	Report-cancel-find_default.gif	
		Report-cancel-results_default.gif	
4.6.9	Multiple Concurrent Login	Report-multilog_default.gif	
4.7	New User	New-User_all.gif	
4.8	Edit User's Details (Edit My User Details)	Edit-User_all.gif	
4.9	View User's Details	View-User_default.gif	

SECONDARY WINDOWS			
Section	Window Name	Filename	Comments
5.2	Login	Login.gif	

5.3	Log Back In	Log_backin.gif	
5.4	Hyperlink	Hyperlink_default.gif	
5.5	Email Link	Email-link_default.gif	
5.6	Look Up	LookUp-editor_default.gif	
5.7	Related Items	Related-items-add_default.gif	
		Related-items-remove_defaul.gif	
5.8	Placement	Placement-add_default.gif	
		Placement-remove_default.gif	
5.9	Translations	Translations_default.gif	
5.10	Insert File	Insert-file_first.gif	
		Insert-file_no.gif	
		Insert-file_yes.gif	
5.12	Switch User View	Switch-userview_default.gif	
		Switch-userview_default.gif	
5.14	Alerts	Alerts-info.gif	
		Alerts-warning.gif	

Appendix B: Forms for Content & Base Data Types

These are HTML files, accompanying this document. Find them in the Appendix_B folder.

Text in square brackets [] is not to be displayed, it is a description of functionality, except on the title line, where it is the FDS's name for the type.

A field with an asterisk * is mandatory

Fields prefixed with a dash indicate them to be constituents of that type's label.

All fields above the first horizontal rule are the type's KIA(s).

The NOTES included in each file is for the UI design team.

Appendix C: Preview

These are HTML files, accompanying this document. Find them in the Appendix_C folder.

They employ example content.

Appendix D: Alerts

Some of the alerts (what Windows-OS refers to as message boxes) that the application will need to produce are listed here. This is not to be seen as an exhaustive list, the exhaustive list (catering for all possibilities) is to come out of the development phase. Particularly events that could happen at the same time, but shouldn't, need to be looked – depending on the development solution, unique alerts will be required to cater for this. An example of such an event is if a user retracts an item from authorisation, but the custodian at that moment has it open, and goes on to authorise it.

The format for the description of the alerts below is: name (for this document's purposes only – the window title for each alert is <CMS name>), ! or ? or X (indicating the type of alert and the graphic to be displayed), a brief description of what the alert is for, the text contents of the alert (between " and " – do not include the apostrophes in the actual alert), button(s).

Alert 1 !

For when background invisible search on KIAs of an item matches an item in the database. onClick 'OK' display the match in a new 'Item' window.

"There is a content item that exists that is similar to the one you are entering. Would you like to view it, to make sure you are not duplicating it?"

Yes | No

Alert 2

If a new user is created, and that user already exists as a user.

"This user already has a login!"

OK

Alert 3

onClick 'Delete' on 'Edit User's Details' window.

"Are you sure that you want to delete this user?"

They will not be able to use the CMS if you delete them."

Yes | No

Alert 4 !

When user closes an 'Item' window, but has not saved any new changes to it.

"Do you want to save the changes you made to <item type: item label>?"

Yes | No | Cancel

Alert 5

For the rare case when a user who has the same username as another user, also chooses the same password. The message is subtly ambiguous on purpose - to point out that the password chosen is already in use by another user with that username is to give the game away. The chance of this alert ever being used by the system is extremely low – it would require someone in the small set of users with like usernames to choose a password that someone else in the set has already chosen. onClick 'OK' close alert window and clear offending password from text field(s).

"Your choice of password does not meet security criteria.

Please choose another password."

OK

Alert 6

onClick OK close alert and bring up the item in question, with the Editor field label in red.

"The editor needs to be someone other than yourself when you Send for Editorship.

Please enter the name of the editor you want to Send for Editorship to, in the item's Editor field."

OK | Cancel

Alert 7

onClick OK close alert and bring up the item in question, with the Commentators field label in red.

"Please enter the name(s) of the commentator(s) that you want to Send for Comment to, in the item's Commentators field."

OK | Cancel

Alert 8

As users can type any name into a custodian, editor, commentator, field, they may type gobble-dee-gook.

"The name <entered name> that you have entered in the Custodian field is not a recognised custodian.

Please enter a custodian's name."

OK

Alert 9

When a 'Translation' command is performed, there is the possibility that the user may enter in the wrong Code and link to a item that already has the translation. So a check needs to be performed.

onClick 'OK' close alert and select all that is in the 'Translation' window's text field box.

onClick 'Cancel' discontinue the 'Translation' command.

"The item that you have linked to already has an <language> translation. Make sure the content code you are entering is correct."

OK | Cancel

Alert 10

Whenever a Code is entered by a user, a check needs to be done that they have not entered gobble-dee-gook.

onClick 'OK' close alert and select offending codes.

"The following Codes that you have entered do not exist:

<entry 1>

<entry 2>

<entry 3>"

OK

Alert 11

When deleting an item in 'Deleted' folder.

"Are you sure you want to permanently delete <type: label)?"

Yes | No

Alert 12

For login when no match for Username and Password

"The login you entered is invalid.

Make sure your Username and Password are correct, and then try again."

OK

Alert 13

For any URL field where user has not entered an absolute URL in the correct format.

"URLs need to be in the format:

http://domain.aa.bb/folder/filename.ccc"

OK

Alert 14

For when a login is no longer valid because of expiry (only check during login process). onClick 'OK' exit the application.

"Your login has expired, you will not be able to login."

OK

Alert 15

For when CMS system is down. onClick 'OK' exit the application.

"The system is temporarily down (offline), and cannot accept logins.

Please try again in a short while."

OK

Alert 16

The user's version of the CMS is not the latest version available.

onClick 'Yes' run user's default WWW browser, and load URL of download pg. onClick 'No' continue running the application.

"You are not running the latest version of <CMS name>. It is important that you use the latest version, as it includes significant improvements to the government-content inputting process.

Would you like to download the latest version? (Recommended.)"

Yes | No

Appendix E: Tender Reports File Output

These are HTML files, accompanying this document. Find them in the Appendix_E folder.

To illustrate the layout of content in these files, example content has been used.

Appendix F: System-Generated Emails

The following emails are generated by the system. They need to be HTML-format, as text formatting is used in the message, as well as hyperlinks and mailto's.

Text between a < and a > indicates a field that the system must fill-in.

The first line in each email below is for the Subject field of that email.

Email 1: For New Users

Welcome to the PGWC's Content Management System

<firstname>,

You've been set up by <creator> as a <Web Author OR Custodian> on the Cape Gateway CMS.

Your login

Username: <Username>

Password: <Password>

These are yours and yours only – please don't lend them to anyone else.

Before You Start

Please make sure that you've been trained on the CMS – it'll make your life a lot easier! (contact: cgsupport@pawc.wcape.gov.za)

Also make sure you've read and understood the [Content Management Policy](#) – it's got practical guidance on what and how to write. (contact: cgsupport@pawc.wcape.gov.za)

Get the Custodian that set you up, <creator>, to outline to you what your responsibilities are: what content should you be creating/updating?

How to Access the CMS

You need to download and install the CMS on your PC:

Go to www.capegateway.gov.za/cms/download and download the CMS.

Install it by double-clicking on the .exe file you downloaded.

Thereafter access the CMS like any other software on your PC.

Help info

Basic help info has been prepared for the CMS. You can access it at www.capegateway.gov.za/cms/help.

Problems/queries

If you have any problems installing or using the CMS, please contact:

Cape Gateway Support

021 483 3376

cgsupport@pawc.wcape.gov.za

Welcome, and good luck!

The CMS team

Email 2: Reminder of Login Details

Reminder: Your Content Management System Login

<firstname>,

Your login is:

Username: <Username>

Password: <Password>

Please contact cgsupport@pawc.wcape.gov.za for any further support.

Regards,

The CMS team

Email 3: Notification of Items Awaiting Authorisation

Awaiting Your Authorisation: <item type: item label>

<firstname>,

The above item is awaiting your **authorisation**.

Regards,

The CMS team

Appendix G: User Goals/Tasks

Following are a list of some of the goals/tasks a user would want to achieve with the application. These are useful to 'walk through' the specified UI, to get an understanding of how it works.

1. Reassign editorship for a content item.
2. A user decides to take editorship of a content item that is 'In for Editorship'.
3. A custodian receives a content item for authorisation, but decides to pass it on to another custodian for authorisation.
4. Change expiry date for an existing content item
5. A content item originally entered in English, has been translated into Xhosa, and now needs to be entered into the CMS and linked to the original English version.
6. A web author has finished entering a content item, and wants to send for comment. But she wants to draw the commentators to a particular contentious matter in the content item. So she needs to be able to enter a preliminary comment in the 'Comments' window, directly from the 'Content Item' window.
7. A custodian wants to delete a particular user from the system
8. A custodian wants to suspend a particular content item.
9. A user wants to retract an authorisation request for a content item.
10. A user wants to retract a comment request for a content item.