GENERAL REQUIREMENTS
The new EPA website was launched in July 2012. To ensure content remains accurate, current and relevant, staff at the EPA need to be able to review and update pages on the website either at need or at scheduled periods during the year.

These reviews and updates will be managed through Sitecore’s workflow capabilities. There are two main activities that nominated contributors, editors and approvers will be involved in once the workflow is in place:

- Content review/archiving – scheduled and periodical, triggered by a date
- Updating existing content or publishing new content – at need, triggered by an action.

Contributors will be responsible for reviewing and updating content. Editors and approvers will check the content before it is approved and published.

The roll out of automated publishing workflows will be staged over several months to ensure that staff aren’t overwhelmed.

In order for this to happen we envisage that Reactive will carry out the work in two stages:

**Stage 1**
- Create new content fields in the CMS
- Create new workflow statuses
- Export specified data into an Excel spreadsheet that we can then filter according to need
- Implement ability to specify workflows at content page level
- Implement review periods/dates

It is expected that Reactive will need to allow time for EPA to review and provide feedback on the implementation of the above tasks, and make adjustments accordingly.

**Stage 2**
- EPA to provide feedback to Reactive on Stage 1 requirements and what, if any, changes are needed for full implementation
- Implement scheduled reviews workflow, including notifications
- Reactive to link Sitecore identities to Active Directory so that content roles can be matched to an individual’s email address and easily updated if there are staff changes.

Stage 2 requirements may change following business process testing and review.

**PROJECT TIMINGS**
Stage 1: completed by end of February 2012
Stage 2: completed by the end of 2012/13 financial year

**PROJECT COSTINGS**
Reactive to provide EPA with separate costings for Stage 1 and an estimate for Stage 2.
STAGE 1: SPECIFIC REQUIREMENTS
The work in this stage will allow us to test the workflows and associated new business processes with a small group of EPA staff.
It will also provide us with important CMS data that will allow us to analyse the content pages/owners/review dates/etc.

1. Fields for content pages
Each standard content page will need:

- **Review period/date**
  This will allow a review date of 3 months, 6 months or 1 year to be set for each page. There will also need to be an option for dates to be customised using a calendar. Regardless of the period chosen, a standard default period of 6 months should be set at the template level.

- **EPA contributor role field**
  This will identify the contributor role for each page (eg: Air SME or Water SME). Contributor roles will be set using a drop-down list that can be populated by the editor. Contributors may be responsible for several pages.

- **EPA approver role field**
  This will identify the approver role for each page (eg: MAU approver or RGU approver). Roles will be set using a drop-down list that can be populated by the editor.

- **EPA owner role field**
  This will identify the directorate or unit owner/s for each page (eg: Strategic Relations or Operations Support). Owners will be set using a drop-down list that can be populated by the editor. There may be more than one owner for a page.

- **Notes free text field**
  This will be filled out by anyone who has access to draft, edit, approve or publish a page.

It will be mandatory for each of these fields to be filled.

2. New workflow statuses
We will need four additional workflow statuses to accommodate the potential for multiple changes in the editing and review process. We also need to separate the approval status from the publish status, as items need to be approved before they are published.

- **Draft** (as soon as a new item is created it’s set as draft. Only the contributor can add content to the page or edit existing content)
- **Edit** (as soon as the item is set as edit, the digital team editor can review updated or new content, edit where required and either set back to draft so it goes to contributor for more changes or set as awaiting approval)
- **Awaiting approval** (as soon as the item is set to awaiting approval, it must be approved by the nominated approver or administrator)
- **Approved** (as soon as an item is set as approved, it is ready to publish)
- **Publish** (as soon as an item is set as published, it is published)
- **On hold**

The above will need to be set up as a new workflow which we will test in the coming months. The existing ‘simple workflow’ should be retained as the default.
3. CMS-generated spreadsheet

We need to be able to generate an Excel spreadsheet (with filters) that captures the data relating to content pages and content pages with sidebar which will allow us to filter the information according to our needs. This includes the new fields listed above and the following:

- Workflow status
- Item ID
- Item name
- Template
- Item owner (NB: this seems to be a system field associated with the template. If so, we probably don’t need this information in the spreadsheet)
- Item title
- Nav title
- FAQ categories
- Keywords
- Description
- News categories
- Redirect settings
- Related items
- Related docs
- Related external
- Include search crawler
- Lifetime – from, to
- Publishing – publish, unpublish
- Statistics – created date and by, updated date and by
- Tasks – archive date, reminder date and recipient
- Workflow – workflow and state
- Last updated
- Url
- Contributor (including email address pulled from the users associated with the role)
- Approver (including email address pulled from the users associated with the role)
- Owner

STAGE 2: SPECIFIC REQUIREMENTS

This stage will allow us to refine the workflows based on feedback through business process testing. This may lead to a change of the requirements outlined here.

1. Scheduled automated review workflow notifications

It's important that this is easy and intuitive for staff to use. Each notification will need to include the following:

- Text telling user what they need to do, when and how (there will need to be different text for each type of notification)
- Appropriate subject line that immediately tells the user what the notification is about (these will need to be written for each notification)
- List of pages needing reviewing. These will need to be links to specific webpages which ideally would be in one email. It would also be useful if there was an edit link which would take users to the Sitecore log in.
- Due date
- Response mechanism acknowledging receipt of email

Notifications timings
We will need to be able to set standard the timings around the scheduled review process, such as:
- Two weeks before the review is due
- Day before review is due
- If review isn’t carried out, then issue two warning notifications which are copied to the approver

2. Publishing workflow notifications
Depending on the results of internal testing, we may need to implement notifications between publishing statuses (e.g.: notification to editor saying that the draft is ready to review, or to the approver saying that the page is ready to approve).

3. Link to Active Directory
This will allow us to match specific content roles to an individual’s email address which can then be easily updated if there are staff changes.

4. CMS reports
We need to be able to generate a range of on-demand CMS reports using specific data. This includes a workflow status report.