



Work Item:

Test Plan and Pilot Study of Universal Acceptance in Content Management Systems, 2020

Ver.: 2020-08-07

Purpose

The Universal Acceptance (UA) Steering Group (UASG) through its measurement working group (WG) is inviting qualified contractors to apply for the statement of work (SOW) for the test plan and pilot study of UA in the content management systems and website builders.

The Content Management System or CMS is a software application or set of related programs that are used to create and manage digital content. CMS is typically used for enterprise content management (ECM) and web content management (WCM). Example of CMS is Wordpress.org.

Website Builders are a subset of CMS, but they are the kind of all-in-one software tools that let users build a site without needing to know any coding or site design skills. Examples of website builders services are Wix, Squarespace, Weebly, etc.

The **Target User** for this study is a user who wants to implement a self-hosted CMS application, like wordpress.org.

The Pilot Study refers to the joint product of the test plan and measurements derived from the application of the test plan, per description of work 1 and 1 respectively.

Description of Work

1. Develop a test plan to measure the state of UA-readiness in Content Management Systems from the point of view of an implementer of the CMS platform (e.g. someone setting up a website).
2. Measure UA-readiness of a CMS implementation – its individual components and the whole – using that test plan.
3. Report the test findings with UASG to determine potential next steps for remediation. For example, work with the UA Communications and UA Ambassadors WG to develop technical training to implement a typical CMS, or work with the UA Tech WG on a mitigation plan to address any deficiencies.
4. Recommend the viability of the next phase, namely, to evaluate other CMS applications using that test plan.



Scope

Since this work is an initial assessment of CMS, yet a foundation for future research work, hence the UASG starting with this pilot study. This Pilot Study will use a typical implementation of a well-known CMS package (i.e. wordpress.org) in addition to extensions that are relevant for Universal Acceptance. The objective of the Pilot Study is to provide the measurement WG with:

- Better understanding of UA Readiness in CMS implementation from the point of view of someone implementing a self-hosted solution to run a website. From an end-user standpoint the WG believes there are no significant differences in user experience among different Internet Browsers in the market; therefore, the WG recommends to focus on server implementation. The next phase of the study can take into account various Internet Browsers to find any differences in end user experience.
- Opportunity to put the UA Readiness Framework to practice and determine its effectiveness.

Upon satisfactory acceptance of the Pilot Study results the WG intends to assess the UA-Readiness of a much larger set of content management systems across different platforms and business models. For example:

- Other self-hosted CMS products: Joomla, Drupal, Cpanel, etc.
- Website builders: Wordpress.com, Wix, Weebly, Squarespace, etc.

Requirements

The contractor must follow the below requirements:

1. UA-Readiness Framework - The analysis must use UASG026¹ - UA Readiness Framework to develop the test plan and conduct the measurements.
 1. Components must conform to the criteria listed below, at minimum.
 2. Test cases must indicate the component and type of testing (e.g. AT, VT, P1T, ST, P2T or DT).
2. Minimum applications and/or extensions:
 1. CMS (Content Management Framework): wordpress.org (self-hosted version; must indicate version used in analysis)
 2. Internet Browser: Chrome for desktop (latest version is preferred; must indicate version number used in analysis)
 3. Server Operating System: Linux (must indicate version used in analysis)
 4. Database: MySQL as required to run CMS
 5. Extension 1, subscription management: An extension that uses an email address of a subscriber to send newsletters or similar communications via email. The WG requires to test at least these five newsletter management extensions, as follows: MailChimp, Mailster, OptinMonster, Newsletter, and Sumo List Builder (See 7.1.1 Email Marketing Plug-ins).

¹ <https://uasg.tech/wp-content/uploads/documents/UASG026-en-digital.pdf>



- Contingency: In the case that none of the five extensions is found to pass all UA tests, we ask that it be made the best and reasonable effort to find an UA-ready alternative.
6. Extension 2, membership management: An extension whose purpose is to enable/disable access to certain pages (i.e. membership-only section). The WG requires to test at least these five extensions, as follows: Memberpress, WooCommerce Memberships, Restrict ContentPro, Paid Memberships Pro, and S2Member (See References: Membership Management).
 - Contingency: In the case that none of the five extensions is found to pass all UA tests, we ask that it be made the best and reasonable effort to find an UA-ready alternative.
 7. Extension 3, event management: An extension that is used to create and manage events with participant list management. The WG requires to test at least these five extensions, as follows: Events Manager, WP Event Manager, Event Organizer, All-in-One Event Calendar, Event Espresso 4 Decaf (See References: Event Management).
 - Contingency: In the case that none of the five extensions is found to pass all UA tests, we ask that it be made the best and reasonable effort to find an UA-ready alternative.
3. Point of view of the test plan - The test plan must be developed from the perspective of the implementer. To this end, the test plan must include:
 1. The step-by-step instructions to install and integrate the core CMS and the extension components. The purpose of this step-by-step instructions is for someone (e.g. UA Ambassador) to be able to replicate for technical training.
 2. Component testing for applicable UA tests per UASG026 (per 'Web-based application' section of UASG026").
 3. End-to-end testing for applicable UA tests per UASG026 (incl section).

Deliverables

The contractor will provide the following deliverables:

1. Test Plan document with test scenarios and cases
2. UA-Readiness report for the subject CMS and extensions
3. Training material; Documentation (e.g. PowerPoint or Google Slides); this document is intended for self-pace to replicate the implementation model. Ideally, the document should include implementers notes which are not captured in the test plan document. In developing the training material consider the following:
 - Purpose: Provide a high-level reference of the test plan, methodology, process, results and observations.
 - Target audience: Technical manager (i.e. high level audience). Knowledgeable about CMS, but not necessarily expert coder.



- Length: The material should be constrained to no longer than 30 minutes, measured by the time one person (within the target audience) would reasonably be expected to need to review the material at his/her own pace.

Proposal Submission

The proposal should be submitted to: UAProgram@icann.org before the submission due date.

The submitted proposal should include the contractor's qualification, experience, previous similar completed projects, a proposed work plan, and the methodology that will be used in conducting the research. It should contain a budget section that indicates the project's cost and the details of the extensions, or tools that will be used (e.g licenses and fees).

Timeline

- Proposal submission due date: 24 August 2020
- Tentative start date: 7 September 2020
- Preliminary draft report: 7 October 2020
- Tentative end date: 15th December 2020

Conflict of Interest

To help avoid any perceived or actual conflict of interest (COI), UASG leaders, UASG Ambassadors, members holding working group's leadership positions in the UASG, and any organization(s) affiliated with individuals in these UASG roles, are prohibited from participating in this SOW. In addition, ICANN org COI applies.

References

1. [UASG004](#) - Use cases for UA-readiness evaluation
2. [UASG026](#) - Universal Acceptance Readiness Framework
3. Extensions:
 1. Email Marketing Plug-ins <https://themegrill.com/blog/wordpress-email-marketing-plugins/>
 2. Address Books <https://wordpress.org/plugins/tags/addressbook/>
 3. Event Management <https://kinsta.com/blog/wordpress-event-management-plugins/> <http://wp-events-plugin.com/features/>
 4. Membership Management <https://optinmonster.com/wordpress-membership-site-plugins/>