What to ask your CMS vendor

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1   Introduction

Selecting a content management system (CMS) is not something you do every week. Typically, people change their CMS every three to five years so often the people responsible for selecting the new CMS were not the same people who selected the last one. The fact you are selecting a new CMS probably means the people who selected the last one are no longer with the company.

You will have compiled many questions to ask your CMS vendor in the Request for Information (RFI) stage and, typically, most of these will about managing the content form a content production point of view, for example: how does the workflow work; how many users can I have; what are the roles and security; how do I create templates to make my site look a particular way; how does it help with SEO, etc.

Often, you will ask about the quality of the content, such as, preventing broken links, and very rarely, you will ask about accessibility. The CMS vendor will be showing you all sorts of wonderful additions to the CMS, for example, live analytics, personalisation and targeting, eCommerce, digital asset management, and so on. It is easy to forget the basics of content quality when you have all this to see.

This document gives you some examples of the questions to ask your CMS vendor at the RFI stage that will highlight how well their CMS copes with basic content quality and accessibility.

As a lot of CMS vendors would rather concentrate on the wonderful additions than basic content quality, many of them partner with Sitemorse to provide content quality assessment before it is published (by integrating with Sitemorse in the CMS) and after it is published (by having Sitemorse scan the published site regularly). Integration with Sitemorse is an acceptable solution.

The questions in this document are based on the best questions the author has seen in CMS RFIs.

2   What to ask

2.1 Describe how your recommended CMS product can create content that complies with the W3C WCAG accessibility standards

Do not ask if it complies because it is too easy for the vendor to just answer "yes". All CMSs can create compliant content. The difficult question is how. You should be looking for answers that mention WCAG 2.1 A, AA, and sometimes AAA. Most international standards for accessibility use WCAG 2.1 A and AA. Integration with a third-party service that specialises in accessibility checking, such as Sitemorse, is a good answer.

If you have an accessibility policy, provide that to the CMS vendor.

2.2 Describe how the editor can identify compliance issues easily

Again, do not ask if, but how. There are many ways to notify an editor that a page has error and these can range from a simple text notification such as, "this page has broken links" with no indication of where, through a table of issues containing all the issues for links, accessibility, etc, right through to a view of the page with the issue highlighted on screen with additional help information explaining the nature of the issue.

Also notice that "editor" was used rather than "user". A user can mean anything from someone who creates content through to an administrator or developer. Be specific. If you say "can a user see an issue …", then if the only way to see that issue in the CMS is for a developer to see it in HTML code, then the CMS vendor can answer "yes".

2.3 Describe how any HTML code generated by your recommended CMS product confirms to HTML syntax and accessibility standards

Here we are usually considering how templates used to generate the website look-and-feel are created within the CMS and how the resulting web pages are checked for issues and compliance. It is typical for developers to be involved in creating the templates (but not always). What you need to determine is if you have full control over what the CMS generates. It might require a developer to make compliant templates for your website, but you need to know that there are no restrictions on what you can do. If there is a restriction on what you can do and this restriction results in bad code, there is nothing you can do to make your pages compliant.

It is also useful to clarify what technologies are required to create website templates or even provide a list to the CMS vendor of the technologies you already use.

2.4 How does the CMS prevent internal and external broken links both at the time the content is made live and after it has gone live?

Here, internal means pages that are on your website that the CMS controls and external means pages you do not control, such as news articles on the BBC website and YouTube pages. Just about every CMS is very good at handling internal links between pages at the time the page is created by the author. If a CMS cannot even do that, walk away.

If page A on your website (internal) links to page B on your website (internal), when you delete page B, the CMS usually does a pretty good job of removing the link from page A (and any other page to which it is linked), or at least letting you know there are some links you need to fix. Some CMSs can check external pages at the time your internal page is saved or published and let you know if you are trying to save or publish a page with a broken link.

Almost no CMS can let you know if one of your internal pages was good at the time it was published but now an external link is broken. Usually, this is because the external site has removed the link and you have no control over that. The reason a CMS cannot do this is because it is designed to create, edit, and publish content, not continually scan the published website, and assess the content after it has left the CMS. Services such as Sitemorse scan your site and do continuous assessment of content far better than CMS vendors, which is why, CMS vendors will often partner with Sitemorse.

2.5 Describe how does the CMS ensure that any email address on my site is valid

Here you want to know how rather than if. There are lots of things you can check in an email and you want to know what is checked and how. Most CMSs treat email addresses in the same way as external links, in that, very little checking is done. The CMS might check the syntax of the email address for a missing @ symbol, but you are lucky if you get that much.

Ideally, you want checking to be done on the syntax of the email address including additional parameters, such as, subject and body syntax if it is used. It is also important to check the email recipient exists. There is no point having a perfectly formed email address on your site if you spelled the email address incorrectly. Sitemorse is one of the few services that checks both the syntax of the email on your web page and checks the email recipient really exists.

2.6 Describe how your CMS checks PDFs for compliance with accessibility standards

Most people forget about all the PDFs on their website, but these must meet accessibility standards too. WCAG 2.1 has a specific section for the accessibility of PDFs.

A CMS usually treats a PDF in the same way as it treats an image, that is, a blob of information with some additional metadata for author, dates, etc. It almost never checks the content of the PDF for links, bad email addresses and accessibility. In some cases, the PDF is handled by a separate Digital Asset Management (DAM) system, which might check the PDF.

Some CMS products can generate PDFs automatically from content. This used to be very popular to create a printed version of content or to generate a contract for signature. If the CMS can generate PDFs automatically, you need to determine the accessibility standard used for auto-generated PDFs. Many software libraries for generating PDFs have very poor accessibility compliance.

Sitemorse performs automated tests for the WCAG 2.1 PDF accessibility checks.

3   About the author

The author of this document has worked for several content management vendors in pre-sales, which means supporting the CMS sale with technical presentations and product demonstrations to the potential client. The author worked in pre-sales for over 90 consecutive sales quarters so that is a lot of experience gained in helping the potential client to select the right CMS – usually the right one was the one the author was demonstrating at the time[1].

How a CMS determines the quality of the content that is published has always been an important issue. For example, many CMSs are very good at internal broken links but most lack any useful way to check accessibility. Just asking about page quality generally will not tease out the information you require. It is important to ask the CMS vendor the right question. Over the years, the author has answered/skirted around/dodged[2] these types of questions. The author knows when a potential client is asking the right question because it is the "difficult question".

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[1] Of course, it was.
[2] Choose whichever you feel is the right one based on the last time a CMS vendor answered your question.

4 Document Control

Amendment history

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