D I G I T A L

RFQ – Web Projects August 20, 2013

Project Estimates

Project 1: Custom Online Calculator

Design has been developed and approved by the client. Next, Pace Digital needs to program and develop the calculators.

Guidelines:

Pace Digital will work with the client's accessibility review team to ensure Section 508 and Accessibility Guidelines are met. A beta version of 1 calculator will be built for the cleint to review before proceeding with the development of the calculators. Where there is some ambiguity the client will arrange for an accessibility consultation.

1. Keep accessibility in mind when choosing technology
2. Allow users to set short term time limits (>20 hrs)
3. Allow teachers to adjust student time limits
4. Check that screen reading media can be read in a sensical order
5. Ensure all added content is user accessible and easy to locate
6. Ensure that keyboard keys reach and operate all controls
7. User's location must be visible on the page when using keyboard keys to move
8. Provide instructions describing how to use the keyboard access
9. Provide in-page navigation to the features or sections using a screen reader/ keyboard
10. Ensure continuity of the user's place – do not change user's screen location unexpectedly
11. Use semantic markup, text formatting and CSS for their intended purposes
12. Provide information through additional methods if it goes beyond text formatting
13. Do not use presentation layers to provide info
14. Label all form fields – tie each user control to text
15. Write links that inform the user of what the page will be about – topic
    a. Link text alone
    b. Link nearest heading, nearest parent list item or table headers
    c. Link text and sentence
    d. Link patterns- link text within context
16. Specify language of the text
17. Provide a title for each frame and each primary media file
18. Consider the user when writing instructions (include semantic information)
19. Ensure the use of validator when checking markup languages and a spell check when checking spelling errors

20. Use standard User Input Controls. If none exist for the specific purpose use, create or repurpose the specific controls.
21. Try to use encoded text instead of images except if the particular presentation is essential or images are the only way to achieve design goals
22. Ensure all text can be resized to 200% in either the user agent or the media
23. Create content that does not cause blinking, flashing or flickering
24. Allow for stop motion, users can pause or stop content that moves for more than five seconds
25. Allow for a still view of moving content-user can read text, equations and diagrams while they are not moving
26. Ensure good foreground/ background contrast for text
27. Keep colour blind users in mind during design process, no reliance on colour coding
28. Ensure contrast in key images
29. Provide an information text alternative for all images that provide information
30. When images represent a control or link, also provide text that serves the same purpose when images are not available
31. Also provide spoken description of any significant visual elements when using multimedia e.g. video, narrated animation
32. Screen reading software to ignore purely decorative features
33. Screen readers to ignore hidden content
34. Allow user to control audios that play for longer than three seconds- stop, pause, rewind, restart
35. Ensure audio clarity and contrast
36. Provide alternatives to sound- when an audio provides information, also provide the info in a text transcript
37. Use captions for movies, animations and slideshows
38. Ensure mirroring of all source materials e.g. e-book for a print version
39. Encourage accessibility in user content
40. Use accessible publishing options and security
41. Provide link to accessible download location for each add-on

Functionalities:

1. **GPA**: Some feedback already offered pertains to functionality. Just in case it needs to be reiterated, here are the goals:
   a. Students need the functionality to add or subtract courses to emulate what might happen term-to-term. Already in mockups
   b. Students need the functionality to name their courses Already in mockups

c. For each course, students need the functionality to insert the credit hours (i.e. 1, 2, 3, 4, or 5). Already in mockups

I had a new thought, but it might be too complicated/expensive. Just in case…
Could we add some functionality to allow students to calculate their cumulative GPA?
This GPA calculator will work a term at a time. I wonder if there is a way to calculate one's GPA over time (a cumulative GPA)? That is, after a student calculates their GPA for the term, could they take their GPA(s) from prior terms and combine it with their GPA for the most recent term? Example: A student took a total of 16 credits first term and earned a GPA of 2.85. This term, the student took 14 credits and earned a GPA of 3.2.
One way would be for the student to put in their grades everytime. For example, the student is in his/her 2nd term. To calculate the overall GPA including the first term, he/she would have to put in the grades from the first and second term. They would have to do this every time.

Another way would be for them to have an online account that would store the data that they have already put in last time. For example, it's the first term the student puts in their grades. The data will be stored. First term finishes, second term comes around, and the student is back to use the calculator. This time, the student will put in the grades only from the second term and calculation will be made based on the newly inputted grades AND the grades they put in last term. This will require a database and additional programming.

An alternative to the online account is cookies, which are a way to store data locally. A downside to this is some people don't have cookies turned on (can't store data), or they delete them (erase the data).

2. **Savings Calculator:** This calculator needs an overhaul. Currently, it only provides a category with a weekly cost and then how much savings a student would have if they didn't spend ANY money in that category. Our proposal is to offer more flexibility than that (and more usefulness, as a result).

   a. **Column 1:** Categories of Spending
   b. **Column 2:** Type of Expenditure (with drop down menu for daily, weekly, monthly. Don't think we need yearly)
   c. **Column 3:** Frequency (students enter numerical values in this column)
   d. **Column 4:** Cost of Item

e. **Column 5:** Savings Strategy
f. **(Not sure if we need to repeat Column 2—type of expenditure—here. Students may decrease their frequency of expenditure or decrease their cost)**
g. **Column 6:** Frequency
h. **Column 7:** Cost of item
Students calculate their savings for their type of expenditure (say, per week or per month) and then get the calculation for yearly savings with the same formula in the existing calculator.

There may be a better way to arrange the columns (i.e. swapping Columns 3 and 4), but without seeing it first, it's a bit tough to tell. These ideas can be discussed as needed. Also, the ideal would be to allow for "sub-column" options that students could list underneath some (or all) categories of spending if they wished to be more specific. For instance, we currently have an "eating out" category. It would be terrific if students could add sub-categories underneath the broader category if they wanted to (i.e., for things such as "snacks between classes," "Starbuck's coffee," "drinks with friends," and so forth).

Categories of Spending	**Suggested Savings Strategy**
Cable/TV	Reduce Cable and TV Costs (use computer instead, change plans, change providers, switch to more basic service options)
Clothing	Reduce Clothing Costs (buy less, buy lesser quality, buy used, borrow more, shop sales)
Eating Out Snacks between classes Late night snacks Coffee/Tea Bottled Water Other drinks Eating out with friends	Reduce food cost (dine in, dine out less often, eat at cheaper places)
Entertainment (movies, games, other social events, etc.)	Reduce Entertainment Costs (spend less on entertainment, find cheaper or free entertainment, reduce frequency of entertainment)
Groceries	Reduce Grocery Costs (buy less, buy generic or lesser quality, shop sales, use coupons)

Housing Rental Mortgage Other	Reduce Housing Costs (find roommate, move to cheaper place)
Personal Care Gym membership/athletic costs Hair care/Hair products Laundry Make-up Nail care Shower/shaving products	Reduce Cost of Personal Care (spend less on personal care or reduce frequency of it)
Phone Landline Cell phone	Reduce Phone Costs(change cell phone providers, plans, options, or phones share phone service costs shop sales)
Transportation Car/Gas/Parking Public Transport Bicycle Walking	Reduce Transport Costs (switch to cheaper transport method, carpool, travel less)
Other	Other
Other	Other

3. **Budgeting Calculator:**

   Can we add the ability for a couple of "other" options on both sides of the ledger?

   "Other options" can be added by pressing the "Add More" button (per mockups).

Technical Requirements

The calculators will be built in HTML5 utilizing responsive design so that they will be functional on desktop computers, phones or tablet devices as outlined below.

- **Microsoft Windows**
  - Windows 7/Firefox 7, 8; Chrome 15, 16; IE 8, 9
  - Windows Vista/Firefox 7, 8; Chrome 15, 16; IE 8, 9
  - Windows XP/Firefox 7, 8; Chrome 15, 16; IE 8j

- **MacOS**
    - 10.7 (Lion)/Safari 5.1; Chrome 15, 16; Firefox 8
    - 10.6.8 (Snow Leopard)/Safari 5.1, Firefox 8

- **Mobile**
    - Tablet Version: iPad and Galaxy tablet versions
    - Smart Phone Version: iPhone 4 and 5 and Samsung Galaxy S3 versions

Project 2: Online Presentation Tool/Application

Overview

A client has an abundance of content for employees and especially the sales force to use when meeting clients and is looking for a tool to help create custom presentations. This online presentation tool would be used by the sales force when making presentations with potential and current clients. The sales force has recently been equipped with laptops—so the online presentation tool would be accessible using laptops or desktops.

The presenter tool should allow all users to build and then view a custom presentation through a flexible interface. Users would build the presentation by selecting topics of interest, with each topic representing a related asset. Upon selection, the asset would be added to the presentation playlist. A variety of assets could be supported by the presenter tool: from videos to image slides to PDFs.

When it comes to the development of the presenter tool, Pace Digital recommends a reusable application with 3 parts:

1. **Online presenter interface:** This is the component through which users can see available presentation assets, select presentation assets to include in their custom presentation, and then view the custom presentation online.
2. **Administrative web application:** This is the component through which any non-technical administrator at the company can create new slides and then upload, edit or delete assets for the presentations. This administrative web application updates the online presentation.
3. **Website:** This is a version of the presentation interface designed specifically for the website. The sales force would have this application to be accessible online using a dedicated website which will be supported by the client's IT department. On the website, the sales team will be able to see the existing templates available and create a presentation from it. From here, sales people can check off assets to build and show their custom presentation. The sales force will then be able to save their presentation. When saving the presentation, the tool will create a presentation ID which can be copy/paste to an email and make the presentation available for the sales force and clients to watch at a later date.

This solution presents a number of options for A client when it comes to project scope.

- Launch online presenter interface with content populated by the client. The online presenter interface would be accessible by desktops and laptops with an Internet connection.
- Launch online presenter interface and online administrative portal. This option is flexible because it allows the client to build multiple slides for the presentation, for different purposes—even for different teams.

While Pace Digital's solution is targeted at the presentation tool, it's been designed with scalability in mind so that multiple teams within the company can share the benefits.

Project Scope of Work

Content
Content will be added by the client using the presentation tool. These assets may include the following files: video; image series; PDF; or presentation slides.

This proposal outlines the development of the presenter tool to house these content assets. Pace Digital can provide a supplementary estimate for design services to help in the creation of some of the slide and content, when required.

Design
Pace Digital will design the presenter tool interface, including the online presenter interface, administrative web application and website. A client will provide any brand standards or guidelines for Pace Digital to adhere to, as well as logo assets.

Functional Specifications

1. End-User Web Application

This is the tool that end-users can use to view the categories and assets for each presentation as well as play the presentation.

The tool will be programmed with:

- Each presentation will have a distinct URL

- Content categories will be displayed within the presentation
- Each asset will be displayed within the category
- The assets will be played in a viewer that will support video, PDF and image series, or a slide.

2. Administrative Web Application

This is the tool that will allow the client to manage presentation assets, categorize the assets for the end-user online and end-user web applications.

The tool will be programmed to allow to:

- Add, edit and delete categories
  - 0..n categories
  - Categories are differentiated by title
- Add, edit and delete assets
  - 1..n assets
  - Categories are either: video; image series; PDF; or presentation slides
    - Image series will be uploaded as individual images that can be re-arranged into a series
    - Videos, PDFs and slides are uploaded as individual assets

3. End-user Online Application

This is the tool that the end-users can use to view the categories and assets from their desktop or laptop.

The tool will be programmed so that the client's sales force:

- Can download the presentation updates when internet is available
- Browse the list of the available presentations in categories, sub-topics
- Presentation can be video, PDF or Jpeg images

Technical Requirements

Hosting Environment

- Microsoft Windows 2008 Server (64bit)
  - IIS 7

- .Net Framework up to 4.5
- Microsoft Active Directory Back End
    - For detecting users credentials (i.e. for saving packages, notifications etc)
- Microsoft SQL Server 2005 Standard Edition

Client Environment

- Microsoft Windows 2007
    - Generally on i5 laptops
- Internet Explorer 8
- Adobe Flash
- Microsoft Silverlight is an option
- Microsoft Office 2007
    - All Windows 7 Machines are running 2007

Final Deliverables

At project completion Pace Digital will deliver project components as digital files ready for upload and publishing to the web by the client IT department. The end-user online application will be disseminated by the client.

Timeline

This project needs to be launched by November 15th 2013.

Project 3: Website Development

Overview

With an out-of-date and aging technology platform, inconsistent branding and unintuitive user experience, a client needs to improve this experience has been identified and the business case has been approved for completion in December (15th) 2013.

The client currently uses Adobe's Contribute Content Management System to manage their global, Spanish and Chinese websites. Within New Zealand and Louisiana, the client is currently working with third party agencies to manage a recruitment microsite in each location due to the lack of functionality available within the Contribute CMS. Each site is unique when it comes to content and design with the exception of the design elements used within the global, Spanish and Chinese websites.

Functionalities

- Implement a responsive visual design that is aligned with our developing corporate branding initiative and is compatible within Internet Explorer 7+, Firefox, Chrome, Safari, Opera, iOS, BlackBerry and Android.
- Implement an intuitive navigation system based on natural language to ensure content is easily accessible by our end users
- Develop a cost effective and efficient approach to both our regional and global needs. Our current approach of creating completely separate websites for every region is no longer feasible and preference would be to allow regional sections to be developed and maintained within the global corporate site. These sections should allow for:
  - Content to be available in both English and the local dialect
  - Region specific content areas
  - Regionally filter news and careers
  - Regional administration
- Expansion of our current communication capabilities beyond an Investor audience to allow for communications related to our regional activities, community initiatives, energy and fuels initiatives and our hiring initiatives at both the regional and global level.
- Development of multiple page templates within the CMS for varying content types and business purposes.
- Procurement and implementation of a web based CMS that allows for the distribution of content editorship over the web (as opposed to an installed application on an editor's computer)*. From a technical feature set point of view the above mentioned CMS must include or have the ability to embed the following features:
  - Ability to build online forms that allow for conditional submission statements, the

  - Ability to attached files and confirmation emails.
  - Ability to easy embed videos
  - Integration of 3rd party feeds such as Marketwire press releases, Social Media feeds and Yahoo! Finance feeds.
  - The ability to allow users to easily share content through social media or email
  - Responsive Design
  - Corporate news feeds with the ability to:
    - Choose what is featured on the homepage
    - Filter by region
    - Place throughout various pages
  - Standard blogging capabilities**
  - Email newsletter functionality (either within the application or integrated with a 3rd party tool) that has the ability to:
    - Allow end users to manage their preferences
    - Allow editors to create and distribute email news letters
    - Allows end users to subscribe and unsubscribe to content types
  - Multilingual Site Capabilities
  - Content Versioning
  - Content Auditing
  - Ability to schedule when updates are released
  - Ability to embed Yahoo! Finance features such as historical price lookup, detailed stock quotes.
  - E-mail Alerts**
  - Investment Calculator**
  - Mobile Editor Access**
- Implementation of a standard contact us form that redirects inquiries to the correct party based on the inquiry itself. For example, the end user chooses "Investor Relations" from a drop down menu – the inquiry is then sent to an Investor Relations inbox.
- Implementation of a job application process that allows the prospective employees to enter their contact information and submit a resume within the site.
- Implementation of a standard request form that gives end users the ability to request hard copies of specific documentation (reports, brochures, etc.) from our Investor Relations and Responsible Care departments.
- Develop a standard style guide for branding, navigation, images, fonts and overall page layouts for use by content editors globally.

User Profiles

- ***National / Local Governments in countries we operate in:***

  - Demographic Profile: Canada, United States, Trinidia & Tobago, Chile, New Zealand, Egypt, Asia Pacific, Europe
  - Needs: Information about the company and its commitment to the countries we operate in (economic benefits, community involvement, environmental protection)
- ***Regulatory Agencies in countries we produce methanol in:***
  - Demographic Profile: Canada, United States, Egypt, Chile, Trinidad & Tobago, New Zealand, Egypt
  - Needs: Information pertaining to our operational and environmental policies, commitments and processes.
- ***Global customers for methanol (traditional applications):***
  - Demographic Profile: Global chemical companies in all major markets.
  - Needs: Price of methanol, service offering for customers, information about the value of doing business with Methanex (differentiator)
- ***Global customers for methanol (energy applications):***
  - Demographic Profile: MTBE customers in Europe and Asia, fuel blending & DME predominantly in Asia, Biodiesel (global markets)
  - Needs: Want to know the benefits of methanol to energy applications / methanol as an alternative fuel. Want to know the price of methanol, service offering for customers, information about the value proposition of Methanex.
- ***Investors***
  - Demographic Profile: Predominantly North American and European Investors
  - Needs: Stock price, investor relations announcements and media releases, presentations, events, who to contact, general company information, in-depth stock information and details around growth projects.
- ***Local Communities***
  - Demographic Profile: Production regions (Canada, United States, Egypt, Chile, Trinidad & Tobago, New Zealand, Egypt) Needs: What are our commitments to the local community? What benefits do we deliver to the local community? How can community members apply for funding?
  - Who can community members contact? How can community members join our Community Advisor Panels? How can they get jobs with Methanex?
- ***Global and regional business, news and trade media***
  - Demographic Profile: Global and Local Media Outlets
  - Needs: Fresh news, announcements, company profiles, management profiles, images for stories, press kit, Methanex story
- ***Social Responsibility/Sustainability Community***
  - Demographic Profile: Global agencies, SRI groups, NGOs

- Needs: Access to disclosure information on our environmental and social performance. Need to demonstrate transparency.