REQUIREMENTS SPECIFICATION

Annex 1 to invitation to tender for development and maintenance services of CBC Intranet, Extranet and WordPress multi-site

Published by the Managing Authority
Publication date 10 January 2017

Funded by the European Union, the Russian Federation and the Republic of Finland.
1. Introduction ......................................................................................................................................................... 3

2. Current environment and description of the tender ............................................................................................... 4
   2.1 Administration .................................................................................................................................................. 5

3. Contents, requirements and functions of the Intranet ............................................................................................ 5
   3.1 Functional requirements ................................................................................................................................. 5
   3.2 Non-functional requirements .......................................................................................................................... 6
   3.3 User rights ...................................................................................................................................................... 7
   3.4 Simplified model of the Intranet ...................................................................................................................... 8
   3.5 Instructions .................................................................................................................................................... 12
   3.6 Search ........................................................................................................................................................... 12
1. Introduction

This requirement description covers the concept, site templates, high-level content structures, functions, and technical implementation requirements of the new Intranet/Extranet and the WordPress multi-site of the South-East Finland – Russia CBC programme 2014-2020 (hereafter "CBC Programme/Client").

The Programme is managed by the Cross-Border Cooperation unit that operates under the Regional Council of South Karelia. The requirement specification is intended to be as the annex to the invitation to tender. The requirement specification was prepared on a level that allows for putting the solutions out to tender.

The CBC Programme made the decision to acquire a new intranet/extranet, because a tool is needed within programme management to:

- process and share documents,
- post news,
- discuss matters,
- process scheduled events,
- document general instructions, and
- manage links

The personnel of the CBC Programme works in two offices, one in Finland (Lappeenranta) and one in Russia (St. Petersburg). The selected supplier must ensure that the intranet/extranet can be accessed easily anywhere and anytime.

The intranet described in this specification will at first be used only by the personnel of the Managing Authority (MA) of the CBC Programme. On the second phase the personnel working in the MA’s branch office in St. Petersburg will be included as a users. It is possible that in the future, the contents of the intranet will also be made available to experts outside the project. It is for this reason that the implementation must support extranet access.

The starting point for the invitation to tender is that the intranet will, to the extent possible, be implemented using the tools included in SharePoint. If software-specific customisations prove necessary in order to achieve the desired function, they will be implemented using HTML, CSS, and Javascript technologies in accordance with Microsoft’s recommendations, or using an APP model.

The Client holds one running multi-site platform on WordPress publishing currently four operative www-sites namely enicbc.fi, sefrcbc.fi, kareliaacbc.eu and cbcprojects.eu. Site www.enicbc.fi acting as the parent site to all mentioned. Maintenance and further development of three out of mentioned four sites is intend to be included to the contract to be prepared due to this tendering process.
2. Current environment and description of the tender

Saimaan Talous & Tieto Oy will deliver to the Client email services (@sefcbc.fi), user right management, Skype, user support services, and network storage disks. Network storage disks are currently used for sharing documents, but in future work documents will mainly be processed through the intranet. Only documents that will be stored permanently will be archived on the network storage disks. The Client is also acquiring a new Programme Management system called PROMAS. This will be located in the local SharePoint and will be maintained by the system supplier.

Saimaan Talous & Tieto Oy will deliver the Microsoft Office 365 environment to the CBC programme management. We request that the suppliers provide a tender that covers the following:

- Design, implementation, testing, and administration of the Microsoft Office 365 intranet and related training. The management tools and contents of the intranet must be in English.
- Preparing and delivering user instructions for the completed Intranet/Extranet to the Client in English.
- Startup of Yammer (or some other application suited to use as a moderated discussion forum) and related training.
- The training languages specified in the tender must be either English, or Finnish and English.
- User support to the Client’s admin users on Intranet/Extranet and WordPress multisite between 8.00 and 16.00.

Suppliers can compare their tender to the requirements specified in Sections 3.1 and 3.2. A description of how the matters specified in the requirement description are to be implemented should either be specified in the tender or appended to it.

Saimaan Talous & Tieto Oy
- Email
- Microsoft AD
- Skype for Business
- Network storage disks for archiving documents
- Maintenance of WordPress sites

Testlab Oulu Oy / Promas
- Local SharePoint 2013
- Management and reporting of CBC programme and projects
2.1 Administration

We request that suppliers prepare a tender on the administration of and user support provided for the intranet. The selected supplier will provide user support to the Client’s admin users. A separate agreement will be prepared for administration and user support to specify their details, such as service and response times.

User support must primarily be provided in Finnish on weekdays between 8.00 and 16.00. The tender must include the service of at least the specified scope and the supplier’s proposal for service and response times and for the processing of service requests.

If the supplier offers extended user support (8.00-18.00) on weekdays, we request that the supplier also encloses with the tender a description of such support.

3. Contents, requirements and functions of the Intranet

This section describes the user rights, contents, and functions of the intranet. The technical proposals included in the document are not binding on the supplier. Therefore, suppliers can, for example, propose that the “Notifications” list be replaced with a blog tool if they believe that this better serves the Client’s needs.

3.1 Functional requirements

Functional requirements have been divided into two categories: critical and non-critical. All critical features must be implemented during this project. Others will be implemented if they have no significant impact on the project budget or schedule. Suppliers must describe in their tender the technical implementation of the below requirements and the components that will be used in the implementation.

<table>
<thead>
<tr>
<th>Critical features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing of documents in a local Office product</td>
<td>Users must be able to process documents in local Office products and share them, at the minimum, as email links via SharePoint.</td>
</tr>
<tr>
<td>Processing of documents in a web browser</td>
<td>Users must be able to update and read documents directly through a web browser.</td>
</tr>
<tr>
<td>Simultaneous processing of documents</td>
<td>The user must be able to process several documents simultaneously using a web browser or a local Office tool.</td>
</tr>
<tr>
<td>User rights</td>
<td>Participants to the CBC Programme must be able to create and delete usernames. The username management must allow for granting some users the right to read the documents, and others the right to edit them.</td>
</tr>
</tbody>
</table>
General links | Administrators of the intranet must be able to specify the shared links. Other users must be able to use these links.
--- | ---
My links | Each user must be able to specify the links they use most in their work.
Annual plan | The intranet must include an annual plan for adding important dates relating to the Programme.
Discussion | The intranet must include a discussion tool that the users can use for sharing information and for discussing matters of their choice. Depending on the technology chosen, either SharePoint’s own discussion forum or Yammer can be used.
Official plan on distributing information of the programme | The intranet must show the latest news published on the CBC Programme website, which has been implemented on a WordPress platform.
Breadcrumb trail | The site template must include a breadcrumb trail that tells the user his or her current and next locations.

Non-critical features

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual plan that looks like a clock</td>
<td>The Client requests that the front page of the intranet includes a clock-like element that shows all important events added to the annual plan.</td>
</tr>
<tr>
<td>Annual plan reminder</td>
<td>The annual plan must include a work cycle or a reminder function that notifies the participants by email X days before a significant deadline.</td>
</tr>
<tr>
<td>Photo archive and sharing of photos</td>
<td>The solution must include a photo archive, to which participants can add photos of e.g. events.</td>
</tr>
</tbody>
</table>

3.2 Non-functional requirements

Critical features

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Customer-specific visual look</td>
<td>The visual look of the intranet must be in line with the CBC Programme. The visual look will be planned together with the Client.</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>The intranet must be responsive to tablet use also.</td>
</tr>
<tr>
<td>English language</td>
<td>The Office 365 intranet must be implemented in English.</td>
</tr>
<tr>
<td>Signing into the system through a web browser</td>
<td>Some of the personnel of the CBC programme work permanently in Russia. Signing in into the system must not require installation of a VPN client programme or other complex VPN technologies. Users must be able to sign into the intranet anywhere and anytime using the browser.</td>
</tr>
<tr>
<td>Administration</td>
<td>The Client’s main user must be able to provide support to other intranet users.</td>
</tr>
</tbody>
</table>
The supplier must offer the user support service referred to in this requirement description to ensure the maximum efficiency of this support.

**Easy user rights management**
The intranet administrators must be able to easily manage user rights.

**Extranet users**
Extranet users will not be included in the system in the initial phase, but the implementation must provide support for this in case of future need.

**Timeframe for the services**
The supplier must be ready to provide contracted maintenance services as minimum until the end of 2022. Other timeframes and the procedures relating to ending the contract and/or making amendments to it shall be specified with the selected supplier.

**Hosting service**
All data must be stored and achieved inside EU.

### Non-critical features

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Signing in into the intranet without a username and password when the browser is opened.</td>
<td>Intranet will open on the user’s browser immediately without the need to enter a username and password when the user works in the internal network.</td>
</tr>
<tr>
<td>Strong identification</td>
<td>Intranet users will sign in into the system using strong identification (e.g. mobile password service).</td>
</tr>
<tr>
<td>Viewing the background organization’s Outlook calendar entries</td>
<td>Intranet users must be able to view calendar entries made by the staff of the Regional Council of South Karelia.</td>
</tr>
</tbody>
</table>

### 3.3 User rights

In the initial phase, the system will have around ten users. External users may also be invited to use the system later.

The intranet will use the following three standard user right groups of the SharePoint:

**READERS**
Can read the contents of the intranet, but cannot produce intranet content.

**PARTICIPANTS**
Can produce content to e.g. lists and document libraries, but cannot edit lists or list views.

**OWNERS**
Full rights to the environment.
3.4 Simplified model of the Intranet

The simplified model described in this section provides an indicative draft of the structure of the intranet. The final visual look will be agreed upon with the Client during the implementation project. The aim should be to keep main navigation as simple as possible. It will be divided into two sections, namely the front page and the instructions page. The usability of the intranet will be improved by displaying a breadcrumb trail.

News and events will be displayed on the front page together with the most important links to document libraries and information sources within and outside the CBC Programme. The front page must inform the users of all ongoing and upcoming events within the Programme.

The instructions page will include all shared operating instructions within the programme. These instructions will be updated by several people in a centralized way, and all other users have reading rights to the contents.
1. Picture area

An area where the administrators can change the picture. The picture area may be static, but the suppliers can also propose banner type picture elements provided that these do not generate additional costs.
2. Links

The administrators will enter on the link list the most important external and internal links relating to the operating environment of the CBC programme. All links added to the list will be displayed on the front page.

Figure 2. An example of the link list administration view.

3. Internal news

All users of the intranet can write news on the “Internal news” list, which is similar to “Notifications”. The maximum of five news pieces will be displayed on the front page. Suppliers can also propose other technical implementation options, provided that these are sufficiently easy to use.

4. My links

All users of the intranet can add to the intranet links that they use most in their own work. My links can be implemented, for example, by creating a separate link list. Links added by individual users will then be displayed in separate views. Other implementation methods can be used as well, as long as they can be implemented using SharePoint’s default tools.

Figure 3. Managing My links.

5. Annual plan

An annual plan is used for displaying and recording the most important events. The annual plan will be implemented using SharePoint’s default calendar component. The events entered into the plan will be displayed on the front page either as a list or in a calendar format.
Figure 4. Annual plan.

6. Documents

The intranet must include document libraries that the Client can use for managing contracts relating to its operations, for processing official documents, and for daily processing of work-related documentation. The solution must include 3-5 document libraries. These will be specified in more detail during the project’s implementation phase.

Versioning will be enabled in the document libraries, and the documents will be classified into different files. The user rights of each user right group to individual document libraries will be specified in more detail in the implementation phase. No archiving features will be needed, as the most important documents will be archived on the client’s local disk and in a paper archive.

The “6 Documents” element is based on the "Documents" link list. Administrators will add document library links to the “Documents” link list. This link list will function similarly to the “Links” list.

7. and 8. RSS feeds

The front page of the intranet will contain one or more RSS areas that retrieve news feeds from the CBC programme website (Wordpress), Twitter account, and Facebook page.

9. Yammer feed

The CBC programme must have Yammer or a similar application that will be used as a discussion forum. The discussion feed chosen by the Client will be added onto the front page of the intranet. The Client must be able to participate in the discussion as a moderator.
3.5 Instructions

In addition to documents, the Client has shared operating instructions that can be accessed via a browser. They can be implemented either using the OneNote application or SharePoint’s page technology. The supplier can suggest both options, but the proposal must take account of search-ability and brows-ability of information and clarity of the interface.

3.6 Search

No separate search centres are required in the system, because SharePoint’s default search functions are sufficient. The supplier must ensure that the search covers e.g. the contents, name, and title of e.g. websites and documents.