

APPENDIX A

PIC SCOPE COMPLIANCE REQUIREMENTS

1. ENTERPRISE CONTENT MANAGEMENT

Required	Description	Requirement can be fulfilled	Bidder Comment	Reference Page on Proposal		
1. Library Services	Ensure that the proposed solution has document check in/ check out capabilities and document level security.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
2. Version Control	Ensure that the solution provides version control for documents, both major and minor versions.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
3. Document Import	Ensure that the solution supports the import of content into the repository.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
4. Indexing Capabilities	Ensure that the proposed solution provides for document index capabilities.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
5. Metadata Management	Ensure that document metadata is automatically captured and versioned.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
6. Compound Documents	Ensure that the proposed solution supports generation of compound documents and that hypertext links are utilised in compound documents	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					

7. Organization/Navigation	Ensure that the proposed solution provides foldering/ structuring capabilities.	<table border="1"> <tr> <td data-bbox="1150 240 1255 285">YES</td> <td data-bbox="1255 240 1360 285">NO</td> </tr> </table>	YES	NO		
YES	NO					
8. Linking Capabilities	Ensure that the proposed solution has document linking capabilities	<table border="1"> <tr> <td data-bbox="1150 378 1255 423">YES</td> <td data-bbox="1255 378 1360 423">NO</td> </tr> </table>	YES	NO		
YES	NO					
9. Offline Capability	Ensure that the proposed solution provides for offline capabilities	<table border="1"> <tr> <td data-bbox="1150 516 1255 561">YES</td> <td data-bbox="1255 516 1360 561">NO</td> </tr> </table>	YES	NO		
YES	NO					
10. Document Security	Ensure that the proposed solution provides for document security.	<table border="1"> <tr> <td data-bbox="1150 654 1255 699">YES</td> <td data-bbox="1255 654 1360 699">NO</td> </tr> </table>	YES	NO		
YES	NO					
11. Taxonomy	Ensure that the proposed solution supports taxonomy development	<table border="1"> <tr> <td data-bbox="1150 751 1255 797">YES</td> <td data-bbox="1255 751 1360 797">NO</td> </tr> </table>	YES	NO		
YES	NO					
12. Scalability	Ensure that the solution supports distributed repository architecture and supports replication of content across distributed servers.	<table border="1"> <tr> <td data-bbox="1150 889 1255 935">YES</td> <td data-bbox="1255 889 1360 935">NO</td> </tr> </table>	YES	NO		
YES	NO					
13. Capture	Ensure that the solution provides a document capture component and supports scanning/capture via multifunctional devices.	<table border="1"> <tr> <td data-bbox="1150 1076 1255 1122">YES</td> <td data-bbox="1255 1076 1360 1122">NO</td> </tr> </table>	YES	NO		
YES	NO					
14. File Formats	Ensure that the proposed solution supports the importing and exporting of images in formats such as XML, TIFF and PDF. The bidder must also ensure that the solution	<table border="1"> <tr> <td data-bbox="1150 1255 1255 1300">YES</td> <td data-bbox="1255 1255 1360 1300">NO</td> </tr> </table>	YES	NO		
YES	NO					

	caters for import and export of individual, small quantities and bulk quantities of documents.			
15. Records Declaration	Ensure that the solution supports both manual and automatic records declaration. This can be rule/policy or workflow based.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
16. Classification	Ensure that the proposed solution caters for semi-automatic or automatic classification of records.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
17. Physical Records	Ensure that the management of physical records is supported by the proposed solution. The bidder must ensure that the solution has bar coding and label printing capabilities for managing physical records.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
18. File Plan	Ensure that the proposed solution has file plan creation and maintenance features and that file plans can be imported.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
19. Legal Holds	Ensure that the proposed solution supports retention holds of records.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
20. Alerts	Ensure that the solution provides for records review cycles and alerts.	<input type="checkbox"/> YES <input type="checkbox"/> NO		

21. Email Management	Ensure that the proposed solution caters for emails and attachments to be managed as records.	<table border="1"> <tr> <td data-bbox="1144 237 1262 282">YES</td> <td data-bbox="1268 237 1373 282">NO</td> </tr> </table>	YES	NO		
YES	NO					
22. Routing	Ensure that the solution provides for “work” and content to be routed through the workflow either via rule-based routing, sequential routing or parallel routing; Supports routing through multilevel hierarchy for authorisations and that each level of authorisation can be modified on an exception basis; routing via email and the web; and includes "rule-based triggers" that can be used within the workflow (for example, time, event, volume and user-defined).	<table border="1"> <tr> <td data-bbox="1144 380 1262 425">YES</td> <td data-bbox="1268 380 1373 425">NO</td> </tr> </table>	YES	NO		
YES	NO					
23. Process Design	Ensure that the proposed solution supports graphically defined workflows and includes workflow development tools e.g. library of starter objects, workflow templates and a test environment)	<table border="1"> <tr> <td data-bbox="1144 928 1262 974">YES</td> <td data-bbox="1268 928 1373 974">NO</td> </tr> </table>	YES	NO		
YES	NO					
24. User Environment	Ensure that the solution has “inbox” functionality for workflow. Give an overview of the solution’s capabilities in terms of “work” being received and distributed. Also, capabilities for in-system review and	<table border="1"> <tr> <td data-bbox="1144 1159 1262 1205">YES</td> <td data-bbox="1268 1159 1373 1205">NO</td> </tr> </table>	YES	NO		
YES	NO					

	approval of content with corresponding audit trail.			
25. Analysis and Modelling	Ensure that the proposed solution has workflow simulation capabilities.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
26. Digital Asset Management	The bidder must ensure that the solution has the capabilities for handling rich media (photographs; audio; video) in the repository.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
27. Solution Accelerators	Solution provides process templates or process frameworks that use a model-driven, declarative approach, rather than traditional procedural and workflow coding, to accelerate the design and implementation of funding applications or other solutions.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
28. Work Queues	Ensure that the proposed solution supports work queues which are stateful, role-based and can be load-balanced.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
29. E-Forms	The bidder must ensure that the solution contains an e-form application.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
30. Search and Federated Search	The bidder must ensure that the proposed solution	<input type="checkbox"/> YES <input type="checkbox"/> NO		

	includes a search engine for the searching of documents properties/metadata and content across multiple servers/document databases and allows for searching against third-party content stores/repositories					
31. Integration	The bidder must ensure that the proposed solution is able to integrate seamlessly with other third-party solutions and ensure that the proposed solution supports APIs e.g. .NET API, Java API and/or a Web services API. The bidder to ensure that the solution is .NET and/or Java EE-certified	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
32. File Sync and Share	The bidder must ensure that the solution provides native file sync and share capabilities.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
33. Reporting	Ensure that the solution provides reporting capabilities, including, but not limited to, third-party reporting tool interfacing, types of reports (for example, preconfigured versus ad hoc), statistical reports and exportation of reports.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
34. Application Development	Ensure that the solution supports scripting languages and includes application development tools, programming	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					

	languages and APIs that enable users to develop and customize the solution			
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2. PIC WEBSITE, INTRANET AND EXTRANET

The PIC encourages creativity in the proposals submitted; however there are certain requirements for the website project. Proposals must account for all of the requirements as set out below.

Required	Description	Requirement can be fulfilled	Bidder Comment	Reference Page on Proposal		
1. Home Page	A clean, visually compelling home page that quickly conveys to the visitor, the PIC's mission and what the PIC does. This should include PIC sub-sites that can be viewed on the current PIC website and dynamic 'Call-Outs' which highlight what's new on the website.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
2. Corporate Branding	Use PIC corporate identity and clearly communicate the 'different business offerings' to the visitors and PIC stakeholders at first glance.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
3. Visual appeal	The site must have an attractive mix of text, images, audio and video.	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					
4. Fast Loading Pages	Optimisation of web pages for a faster browsing experience	<table border="1"> <tr> <td>YES</td> <td>NO</td> </tr> </table>	YES	NO		
YES	NO					

5. Responsive Design	The site must be mobile-optimised through responsive design methods. Therefore, it should detect that a mobile device is being used and present the user with the mobile version first. The user should be able to switch to the desktop version.	<table border="1"> <tr> <td data-bbox="1199 237 1308 282">YES</td> <td data-bbox="1308 237 1417 282">NO</td> </tr> </table>	YES	NO		
YES	NO					
6. Simple and clear navigation	The site should be easy to navigate. Information should be grouped and presented in a logical manner and require no more than three levels of “drill down” for the user to find the desired information thus creating a clean, clear, easy and satisfying user experience. This should include drop down menus, so that the visitor can easily find what they are looking for with a few clicks of the mouse.	<table border="1"> <tr> <td data-bbox="1199 464 1308 509">YES</td> <td data-bbox="1308 464 1417 509">NO</td> </tr> </table>	YES	NO		
YES	NO					
7. Search Tools	Provide search capabilities using key words or phrasing that will provide access to content from throughout the site. Additionally, make it possible to download historical and recent data thereby the user can define his/her preference for the length of series.	<table border="1"> <tr> <td data-bbox="1199 789 1308 834">YES</td> <td data-bbox="1308 789 1417 834">NO</td> </tr> </table>	YES	NO		
YES	NO					
8. Links	Links should be placed within the website to allow individuals to contact institutions affiliated with the PIC as well the respective stakeholders (can be called Useful Links).	<table border="1"> <tr> <td data-bbox="1199 1021 1308 1066">YES</td> <td data-bbox="1308 1021 1417 1066">NO</td> </tr> </table>	YES	NO		
YES	NO					
9. Downloadable resources	Provides a resource section with links to downloadable documents and templates appropriate to the audiences.	<table border="1"> <tr> <td data-bbox="1199 1203 1308 1248">YES</td> <td data-bbox="1308 1203 1417 1248">NO</td> </tr> </table>	YES	NO		
YES	NO					
10. News/Update feed	Constant and dynamic update feed on site home page. Displays announcements and notifications for new content	<table border="1"> <tr> <td data-bbox="1199 1305 1308 1351">YES</td> <td data-bbox="1308 1305 1417 1351">NO</td> </tr> </table>	YES	NO		
YES	NO					

	additions on front page of site which can be pushed via podcast or RSS.			
11. Calendar	A dynamic (internal and external) calendar that displays events as well as filters for searching/ sorting events.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
12. Users-Only Content	Certain content will be available ONLY to authenticated users. Account creation is limited to site administrators. User password recovery and profile management functionality is required.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
13. Contact Form	Provides a web-based contact form with anti-spam controls	<input type="checkbox"/> YES <input type="checkbox"/> NO		
14. Automated E-mails	Automatically send follow-up emails to our stakeholders (subscribers) if they visited a specific web page, or completed some specific task (e.g. survey) on the website or intranet.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
15. Services Transactions	Facilitate online purchases of PIC coins and other collectibles, and facilitate online fundraising initiatives. The user experience must be friendly.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
16. E-Training	Webinars and webcasts functionalities.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
17. Social Media Engagement Tools	New tools to improve interaction with social media	<input type="checkbox"/> YES <input type="checkbox"/> NO		
18. Blog	The site should have a Blog section to facilitate discussions on various topics.	<input type="checkbox"/> YES <input type="checkbox"/> NO		

19. Career	The site should have a career section which should accept online job application that would be fed directly into the PIC HR system.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
20. Language Options	The website ought to be easily translated into other languages even if documents remain in English.	<input type="checkbox"/> YES <input type="checkbox"/> NO		

Technical Requirements

Required	Description	Requirement can be fulfilled	Bidder Comment	Reference Page on Proposal
1. Compatibility	Site must be compatible with Google Chrome, Microsoft® Internet Explorer 8.0 or higher, Microsoft Edge, Mozilla Firefox, and Safari 5.0 or higher.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
2. Mobility	Site must be “responsively designed” to accommodate mobile users. This must include accommodations for slower, cellular internet connections.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
3. Settings	Website must not require plug-ins as a default.	<input type="checkbox"/> YES <input type="checkbox"/> NO		
4. Web Accessibility International Standards	The site must be built in accordance to the Web Content Accessibility Guidelines 1.0, provided by the W3C and should also be easily accessible to the novice as well as the experienced Internet user.	<input type="checkbox"/> YES <input type="checkbox"/> NO		

5. Security	Site must work seamlessly with online systems. All transactions should be done through SSL certificate with Extended Validation to ensure security of all transactions using encryption between the client and website.	<table border="1"> <tr> <td data-bbox="1205 237 1314 282">YES</td> <td data-bbox="1314 237 1423 282">NO</td> </tr> </table>	YES	NO		
YES	NO					
6. Performance	Site must be able to handle multimedia (video) with high performance	<table border="1"> <tr> <td data-bbox="1205 420 1314 466">YES</td> <td data-bbox="1314 420 1423 466">NO</td> </tr> </table>	YES	NO		
YES	NO					
7. Authentication	Ensure that the proposed solution supports authentication/access control e.g. directory authentication with Active Directory (AD) etc.	<table border="1"> <tr> <td data-bbox="1205 522 1314 568">YES</td> <td data-bbox="1314 522 1423 568">NO</td> </tr> </table>	YES	NO		
YES	NO					
8. Rights Management	Ensure that the solution has adequate rights management which prevents certain documents from being forwarded and or printed.	<table border="1"> <tr> <td data-bbox="1205 706 1314 751">YES</td> <td data-bbox="1314 706 1423 751">NO</td> </tr> </table>	YES	NO		
YES	NO					
9. Web Metrics	Must be able to have a wide range of web analytics functionality that can track and analyze how people use the website and produce meaningful reports.	<table border="1"> <tr> <td data-bbox="1205 889 1314 935">YES</td> <td data-bbox="1314 889 1423 935">NO</td> </tr> </table>	YES	NO		
YES	NO					
10. HTML Compliance	Full compliance with HTML 5.0 or higher.	<table border="1"> <tr> <td data-bbox="1205 1031 1314 1076">YES</td> <td data-bbox="1314 1031 1423 1076">NO</td> </tr> </table>	YES	NO		
YES	NO					
11. Levels of Access	Role-based member permissions must be used to determine user access to various pages and content types.	<table border="1"> <tr> <td data-bbox="1205 1133 1314 1179">YES</td> <td data-bbox="1314 1133 1423 1179">NO</td> </tr> </table>	YES	NO		
YES	NO					
12. Users-Only Content	Certain content will be available ONLY to authenticated users. Account creation is limited to site administrators. User password recovery and profile management functionality is required.	<table border="1"> <tr> <td data-bbox="1205 1297 1314 1343">YES</td> <td data-bbox="1314 1297 1423 1343">NO</td> </tr> </table>	YES	NO		
YES	NO					

13. Content Migration	Contractor will transfer existing content into the new site template. PIC will develop new content as required.	<table border="1"> <tr> <td data-bbox="1201 237 1314 282">YES</td> <td data-bbox="1314 237 1430 282">NO</td> </tr> </table>	YES	NO		
YES	NO					
14. Parallel sites	After 'Go Live' there should be two (2) sites running parallel, one (1) for testing purposes and the other for production. All maintenance should be carried out in the test environment and be approved before migrating to the live environment.	<table border="1"> <tr> <td data-bbox="1201 334 1314 380">YES</td> <td data-bbox="1314 334 1430 380">NO</td> </tr> </table>	YES	NO		
YES	NO					
15. Content Management and Maintenance	<p>Site should be easy to manage and maintain by PIC internal staff members:</p> <ul style="list-style-type: none"> • site should not require significant investment of time to keep site up and working with quick and easy fixes • site should be easy to update with new content. 	<table border="1"> <tr> <td data-bbox="1201 506 1314 552">YES</td> <td data-bbox="1314 506 1430 552">NO</td> </tr> </table>	YES	NO		
YES	NO					