

Conceptual Design Review

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Project: ProcurementDirectory.af

Author: <signed> _____ Date _____
Ric Shreves
Business Systems Analyst
Peace Dividend Trust

Concurred By: <signed> _____ Date _____
Bryan Rhodes
Chief of Party
DAI - ASMED

Approved By: <signed> _____ Date _____
Shirine Pont
Country Director
Peace Dividend Trust - Afghanistan

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Change control section

This section is used to record the amendment history of this document

Date	Sections changed	Reason for changes
23/jan/08	None	R. Shreves. First Draft
24/jan/08	User Profiles, ToC, Phases	R. Shreves. Reviewed by Shirine; Discussed with team.
27/jan/08	Numerous	R. Shreves. Final revisions, corrections and clarifications

I. Introduction

This document is intended to specify the main business requirements for the PDT project known as the Procurement Directory. The initial project roll out is intended to satisfy the needs of PDT - Afghanistan. PDT also currently runs a similar initiative in Timor-Leste and will be deploying other projects elsewhere in the short to medium term. Accordingly, while the needs of Afghan project are paramount, the development must take into account the need to replicate the project quickly and at low cost in other countries. An important goal is to limit re-deployment expenses to data entry and localization of the interface.

The objectives of this project are as follows:

1. To enhance the functionality of the existing site by adding an online tender system, an improved directory, and a variety of lesser functionalities, as detailed herein.
2. To redesign the website with a clean professional look.
3. Improved accessibility. Website must validate and comply with minimum WCAG standard (Level A).
4. Design suitable for narrow bandwidth environments.
5. Easy to use content management tools.
6. Advanced search functionality to enable searching for businesses and tenders by a variety of criteria.
7. To provide online information resources for both buyers and sellers.
8. To provide information about the project and its supporting organizations.
9. Multi-language support.
10. Improved suitability for search marketing

The contents that follow describe the broad scope of the project, the content structure, the functionalities, and the priorities.

II. Details & Assumptions

- A. This project involves the re-design and expansion of an existing site (www.ProcurementDirectory.af).
- B. A primary goals of the re-design are:
 - 1. Enhanced Functionality
 - 2. Improved Content Management
 - 3. Create a technical infrastructure that can be deployed in other markets
- B. The structure and hierarchy of the site are based on the attached diagram of the site's logical structure (see attachment A).
- C. The new site will re-use a significant portion of the existing site's text and the existing database of business listings. PDT is undertaking a content audit and will transfer to the vendor all the content in electronic form as well as a proofed hard copy. PDT will handle scanning, translation and proofreading. Images will be provided by PDT, including stock, where needed.
- D. Production of the site must include optimization of the pages for search engine marketing. PDT will aid in the preparation of metadata.
- E. The site must be able to support multiple languages, though the admin interface and the initial launch will be in English only.
- F. The site is to be developed with open source software and any components/extensions developed for the project will be governed by license terms consistent with the GPL.
- G. The project will be done in stages, with the launch of the Public Beta of Phase 1 fixed at 30 April 2008. Phase 2 launch is set for 30 June 2008.
- H. The site will be created on the LAMP stack and will employ an open source CMS (possibly Drupal with CiviCRM, though vendor feedback is needed).
- I. The project may be split between vendors due to the aggressive timelines (one vendor for interface design; one for custom development).
- J. The estimated budget is TBD and will depend on donor acceptance.
- K. Materials deadline for the content team is fixed at 31 March 2008, though this schedule has yet to be approved by the vendor(s).

III. Overview

Peace Dividend Trust (PDT) is a Canadian-based NGO that works around in the world in post-conflict economies. The project located in Kabul is working to increase international procurement from local Afghan companies. PDT's activities are funded by the Canadian International Development Agency and the U.S. Agency for International Development. PDT currently offers the services free of charge to help both international organizations and local suppliers.

PDT has been contracted by Development Alternatives Inc (DAI) to create a Business-to-Business platform to facilitate and ease information exchange for the development of industries in Afghanistan. The plan is to expand the existing procurement directory (www.procurementdirectory.af) into a B2B platform. Key elements of the B2B platform include a directory of suppliers and an online tendering system. The goal is to create an online marketplace that facilitates local purchasing by international firms.

The website will be launched first in English, with the possibility of later adding additional languages native to Afghanistan (i.e., Dari and Pashto). The system will be re-deployed in other markets in which PDT works.

Vendors are needed to perform the following services:

1. Make recommendations based on the agreed requirements, timeline and budget
2. Design the graphics, layout and interfaces
3. Implement and configure an open source CMS and code any custom modules needed
4. QA the system
5. Migrate the existing database (over 3,700 entries)
6. Implement the system

The following services are optional:

1. Load the content pages
2. Installation of non-essential Drupal modules (assuming a Drupal build)

Vendors do NOT need to perform the following services:

1. Provide domain names, hardware or hosting
2. Search engine marketing
3. Translation, content creation or content editing

IV. User Profiles

This section defines the users who will use the site and identify what benefits they expect to gain from its implementation.

- A. PDT Content Manager (registered user)
 - 1. Will access the system regularly using a PC or a Mac with the most recent version of Firefox.
 - 2. Highly sophisticated user, able to perform all common tasks without necessity of additional help.
 - 3. Ability to Search and Review all of the information on the site.
 - 4. Ability to maximize marketing efforts.
 - 5. Ability to edit / update content via CMS.
 - 6. Ability to edit / update directories.
 - 7. Ability to generate reports on directory data.
 - 8. Will work from narrow bandwidth environment.
- B. PDT SuperUser (registered user)
 - 1. All the functions of a Content Manager, plus the following:
 - 2. Ability to assign login name & password, ban users, etc.
 - 3. Ability to install / configure / delete extensions.
 - 4. Ability to install / modify / delete Themes.
 - 5. Ability to take site offline.
- C. Buyer of Goods or Services (registered user – front end only)
 - 1. Will access the system using a PC with recent version of Internet Explorer or Firefox.
 - 2. Some will work from a narrow bandwidth environment.
 - 3. Ability to search and explore all content areas, except for areas marked private (e.g., private tenders and private supplier ratings).
 - 4. Ability to access their profiles and edit them.
 - 5. Ability to upload / edit / delete their tenders.
 - 6. Ability to view detailed listings of suppliers.
 - 7. Ability to manage vendor lists (create a group of “preferred” suppliers to whom they can send tender documents).
 - 8. Rate suppliers
 - 9. Manage supplier lists and contract history
- D. Supplier of Goods or Services (registered user – front end only)
 - 1. Many will not access the system. Those that do, will do so on a PC with a relatively recent version of Internet Explorer or Firefox.
 - 2. Less sophisticated user.
 - 3. Will work from narrow bandwidth environment.
 - 4. Ability to search and view all content areas, except for areas marked private (e.g., private tenders and private supplier ratings).
 - 5. Ability to set and manage alerts to receive tenders.
- E. Visitor (front end only)
 - 1. Will access the system using a PC with a relatively recent version of Internet Explorer, Firefox, Safari or Opera.
 - 2. May be in a low bandwidth environment.
 - 3. Moderately sophisticated users, able to perform all common tasks without necessity of additional help.
 - 4. Ability to Search and Review all of the content, including public tenders, and view limited profiles of the suppliers.

V. Project Scope

A. The following provides a list of the content areas with a brief synopsis of each.

1. **Home Page**
 - This is the entry page for the site. The page will need to be content heavy with an eye towards search marketing and towards helping someone new to the site grasp quickly what it is all about. Links into the Directories and the Tender system will be prominent, perhaps showing select listings (e.g., “featured” or “newest” or “most popular”).
2. **For Buyers**
 - Information to educate prospective buyers about the services available and why they should use them.
 - Includes a form that allows them to register to use the system.
 - There will be secondary pages here.
 - This should appear on the primary nav.
3. **For Suppliers**
 - Information to educate prospective suppliers about the services available and why they should use them.
 - Includes a form that allows them to request listing.
 - There will be secondary pages here.
 - This should appear on the primary nav.
4. **For Investors**
 - Information about Afghanistan for potential investors.
 - There will be secondary pages here.
 - May include downloads.
 - This should appear on the primary nav.
5. **Market Information**
 - Includes synopses of market data that is available for download.
 - This should appear on the primary nav
6. **About Us**
 - About the site and the sponsors.
 - There will be secondary pages here.
 - This can appear on the secondary nav.
7. **News & Media**
 - One page should aggregate news feeds relevant to Afghanistan business.
 - Another sub-section will be a press room for the site, including press releases, contact details, etc.
 - This can appear on the secondary nav.
8. **Help / FAQs**
 - How to use the site and answers to common questions.
 - There may be secondary pages here.
 - This should be prominent, top of the page, though not necessarily on the primary nav.
9. **Terms & Conditions**
 - Single page.
 - This can appear on the secondary nav.
10. **Useful Links**
 - Single page.
 - Relevant links only – not an SEO link farm.
 - This can appear on the secondary nav
11. **Site Map**
 - Single page.
 - Perhaps auto-generated?
 - This can appear on the secondary nav
12. **Privacy Policy**
 - Single page.

- This can be a second-tier page, off either About Us or Terms & Conditions.

B. The following provides a list of functionality, which is explained in detail in Section VII of this document.

For Visitors:

1. **Business Directory**
 - Key Functionality / Site Feature
 - On Primary Nav
2. **Online Tender System**
 - Key Functionality / Site Feature
 - Requires integration with SMS gateway
 - On Primary Nav
3. **RSS Aggregator**
4. **RSS Syndication**
 - for tender section only, by category of tender
5. **Site Search**
 - Note: see details below – this is complicated
 - Prominent on pages
6. **Simple Gallery (optional)**
7. **Send to a Friend**
8. **Print Friendly Pages**
9. **Bookmark This Page**
10. **Subscribe to email alerts**
 - for suppliers to be notified of tender postings
11. **Maintain your account**
 - including directory listing
12. **Buyers rate Suppliers**
13. **Member Registration**
14. **Member Login**
 - with Password Reminder
15. **Event Registration**
16. **Download various documents off content pages**
17. **Buyers can assemble and manage preferred supplier lists**
18. **Control font size**
19. **Contact Forms**
 - there will be multiple forms

For SysAdmins:

20. **Content Management**
21. **User Management**
22. **Ad Management (basic)**
23. **Reporting & Tracking**
24. **Offline Data Entry Tool with easy import**
25. **Ability to mail users from within system**

C. This project will involve a deployment in 2 phases. The following provides a breakdown of our preferences for the contents of each phase. We expect the vendor to provide feedback and recommendations in order to achieve the timeline and the budget.

1. Phase 1 : Beta launch 30 April 2008
 - All content areas
 - Business Directory
 - CMS
 - Event Registration
 - RSS Aggregator
 - Contact Forms

- Minor functionalities, as time permits (need vendor advice on this)
2. Phase 2 : Launch 30 June 2008
- Online Tender System, and related functionality, e.g.,
 - RSS Syndication
 - Tender Notifications
 - Simple Gallery
 - Buyers Rate Suppliers
 - Buyers can assemble and manage preferred supplier lists
 - Offline data entry tool

VI. Look & Feel, Usability, SEO

- A. Strong Usability
 - 1. High contrast between text and background
 - 2. Font size switcher
- B. Branding Issues – Creative Brief will be provided to selected vendor
- C. Consistent Information Architecture
 - 1. H1 used for site name
 - 2. H2 for Page Names
 - 3. H3 & H4 for Content Titles
- D. Alt Image Tags and other attributes used consistently
- E. Dublin Core Metadata
- F. Installation and configuration of Drupal SEO-related Modules (as per listing in Sec.8, below)
- G. Navigation
 - 1. Text, not images
 - 2. Mouseovers
 - 3. Top Nav and/or Right hand nav for main nav
 - 4. Bottom nav for secondary nav
 - 5. Breadcrumb Trails
- H. Reference Sites: Will be provided as part of Creative Brief
- I. CSS-based design
 - 1. Preferred: 3-column home page, 2 column interior pages
 - 2. Optimized for 1024 x 768, but with flexible width (liquid design).
- J. This is a narrow bandwidth project
 - 1. Keep page size down
 - 2. Avoid Ajax
 - 3. No Flash
 - 4. Optimize images
 - 5. Look at selective caching of content pages (not directory or tender pages)

VII. Functional Business Requirements

This section will define an overview of functions and is not intended to define user hierarchies.

- A. Access Control (ACL)
 - 1. Consistent with the User Profile data in Section IV, above.
 - 2. Site should support OpenID
- B. Site Administration Functions
 - 1. All the functions one would normally find attendant to a system like Drupal.
- C. Site Search
 - 1. Site Search: All users can search site content. This is basic keyword searching.
 - 2. Member (Directory) Search: All users can search the directory entries on a variety of criteria (TBD). This is a search of moderate complexity.
 - 3. Tender Search: All users can search (and filter) the tenders by a variety of criteria (TBD). This is a search of low complexity.
 - 4. Admin Search: Custom search criteria for Content Manager for the Business Directory. This is a search function tailored to the needs of the administrators, e.g., find most recent updated, total number of entries, entries by category, change log, etc.
- D. Content Management Functions
 - 1. A content management interface like that given by Drupal is fine, plus:
 - WYSIWYG editor
- E. Languages
 - 1. The site will be launched in English.
 - 2. The site, including the directory, will be able to support additional languages in the future.
 - Must support double byte characters
 - Must support left-to-right and right-to-left
 - 3. The front end is the big issue here – the admin interface in English is fine.
- F. Supplier Ratings
 - 1. Numerical rating on a variety of criteria (TBD)
 - Ratings generated by buyers only
 - these ratings will be visible to the all users
 - 2. Text field for comments
 - comments generated by buyers only
 - buyers can keep the comments private or make them public
 - All public comments go into an approval queue and must be reviewed and approved by Content Manager
- G. Tell a Friend
- H. Bookmark This Site
- I. Member Registration
 - 1. Password Reminder Function
 - 2. Email verification is not required.
- J. Event Registration
 - 1. Note: Perhaps implement CiviEvent?
 - 2. No need for online transactions at this stage – only a registration list to exhibit “interest.” Follow up will be done offline (outside of system).

- K. Offline Data Entry Integration
1. Ability for content managers to gather member information offline and then import into the system with ease
 2. Data gathering will not be done in a client/server environment (verification team uses stand alone computer, typically a notebook computer used in the field).
 3. Solution can employ technology like Excel, if developer desires.
- L. Ability to Mail User
1. Ability for website administrators to send emails to members or groups of members.
 2. Note: Perhaps employ CiviMail?
- M. Ad Management
1. Basic advertising management system.
 2. Note: Initially will be used only to display badges of donors.
- N. SMS Gateway Integration for Tender Notifications
1. SMS will be used to send notifications of new tenders. The notifications can be sent by either the content managers or by the seller, who selects to recipients from either categories from the directory or from their preferred vendor list.
 2. See section, O, below, for more detail on Tender Notifications
- O. Online Tender Manager
1. For Sellers
 - submit description of tender via online form
 - ability to attach documents to the tender in common formats (these will be attached to the tender listing and available for download)
 - designate open (public) or closed (private) tender
 - private tenders will be sent only to the suppliers designated by buyer
 - open tenders will be visible on the front end of the website
 - ability to review history of the tenders they have submitted
 - tenders will have start / stop dates
 - will tender is active, open tenders will be visible on the front end as a “live” tender.
 - after closing date, all public tenders will be visible on the front end as a “closed” tender.
 - after a tender has been awarded, it will be displayed on the front end of the site as an “awarded” tender and will include information concerning to whom it was awarded.
 - buyer able to modify / edit after posting
 - tenders will not be reviewed / approved by Content Manager – they go live when scheduled by the buyer
 2. For Suppliers
 - Ability to view all public (“open”) tenders
 - Ability to subscribe / manage email alerts of new open tenders (by category)
 - Ability to subscribe to RSS feeds of new open tenders (by category)
 3. Tender Notifications
 - Buyers who upload a private tender can select who receives it and broadcast the tender notification from within the system.
 - The method of the broadcast (SMS or email) will be defined by the communication preferences set in the Suppliers’ listings.
 - Buyers who upload a public tender can choose to broadcast it automatically to the suppliers who are members of the categories in which the tender is associated (the tender categories and the supplier

directory categories are identical). Alternatively, the Buyer can elect not to broadcast, in which case the Content Manager will do so via the admin interface.

- Public tenders will go live on the website front end as per the schedule (start/stop dates) set by the Buyer.

4. Submitting a Proposal: Suppliers will reply to tenders outside the system.

P. Business Directory

1. Buyers

- viewable by all site visitors
- Buyers can log in to manage their profiles without the necessity of review by the content manager.

2. Suppliers

- view existing site for guidance as to basics
- basic profiles viewable by all visitors
- wish to add extended profiles (note, this is not available on the present site)
 - extended profiles only viewable by registered buyers
- suppliers can login to manage their profiles but all changes must be approved by the content manager
- Geo-tagging should be supported
 - Would like to explore possibility of including mapping on each entry (note: need vendor advice on this point)

Q. Contact Forms

1. Basic contact forms

- General information
- Webmaster
- Request for listing by supplier

2. All forms throughout the site must employ CAPTCHA (and retain accessibility!)

R. Basic Gallery

1. This will not be a navigation item.
2. Ability to create Galleries, which will be linked to from within content pages, e.g., a “Past Events” hyperlink inside the Events section.
3. A simple Gallery component is probably fine.
4. If done in Drupal, it is possible this could be done without a separate module, but by creation of a content type.

S. RSS

1. Need RSS aggregator tied to Newspaper Module (assuming Drupal), or functional equivalent.
2. RSS syndication for the tender section only – by category

VIII. Technical Solution Summary

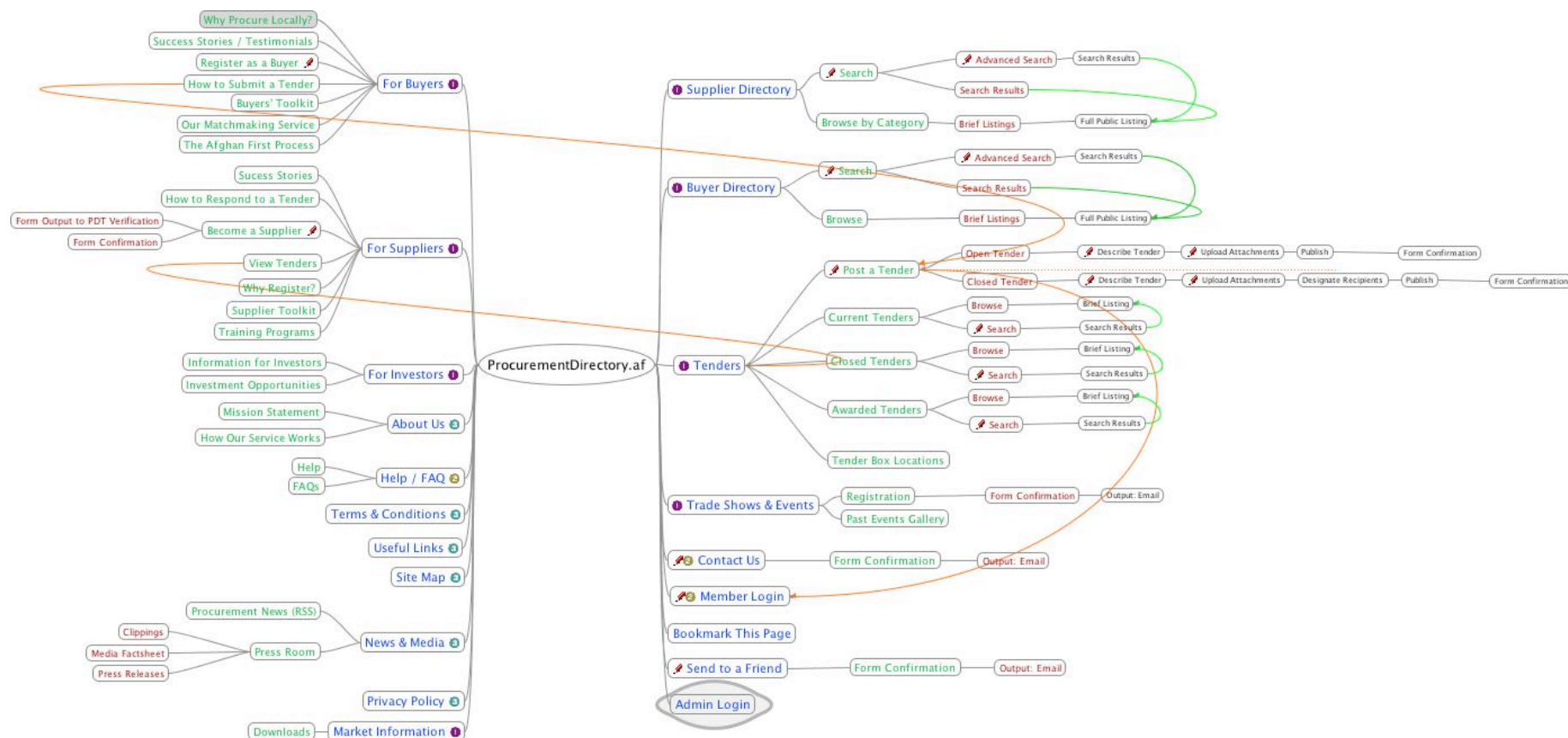
This section contains a brief outline of the technical solution, listing the technology utilised, third party software requirements, hardware requirements, and anticipated enhancements.

Technical Issues	Preferences
Database	MySQL
Server Operating System	Linux
CMS	Drupal + CiviCRM (recommended)
Programming Languages	PHP, Perl, HTML, JavaScript (as needed)
Hardware Selection	Webhost TBD
Browser Compatibility	The front end of the web site must be compatible with versions of the following web browsers released in the last 2 years: Microsoft Internet Explorer, Firefox, Safari, Opera. The backend of the website (admin system) should support the most recent versions of IE and Firefox.
Note on scalability	The current directory holds over 3,700 listings. That number will grow to 8,000 within several months of launch. It is conceivable that the directory could list 10,000 businesses. System architecture must take this, and the possibility of additional languages into account.

Assuming the use of the Drupal CMS, we would request the installation of the following modules:

1. CiviCRM, including
 - a. CiviEvent
 - b. CiviMail
 - c. CiviMember (though we will not charging for membership at the outset!)
 - d. Note: The 2.0 releases is in Alpha right now, with final release slated for late February. Suggest we build for 2.0
2. CCK
3. Comment Mail
4. Find URL Alias
5. Global Redirect
6. Google Analytics
7. XML Sitemap
8. News Page
9. Meta tags
10. Page Title
11. Pathauto
12. Safe HTML
13. Search 404
14. Taxonomy Manager
15. Token (if needed)
16. CAPTCHA
17. Fivestar (if needed for supplier ratings)
18. Voting API
19. WYSIWYG editor (prefer TinyMCE or FCKeditor)
20. Ad Manager

Attachment A – Logical Structure



Note: The numbers indicate navigational hierarchy, e.g., 1 = most important; 2 = less important, and so on.