Annex 2
Key requirements for Sphere Website enhancements (Phase II)

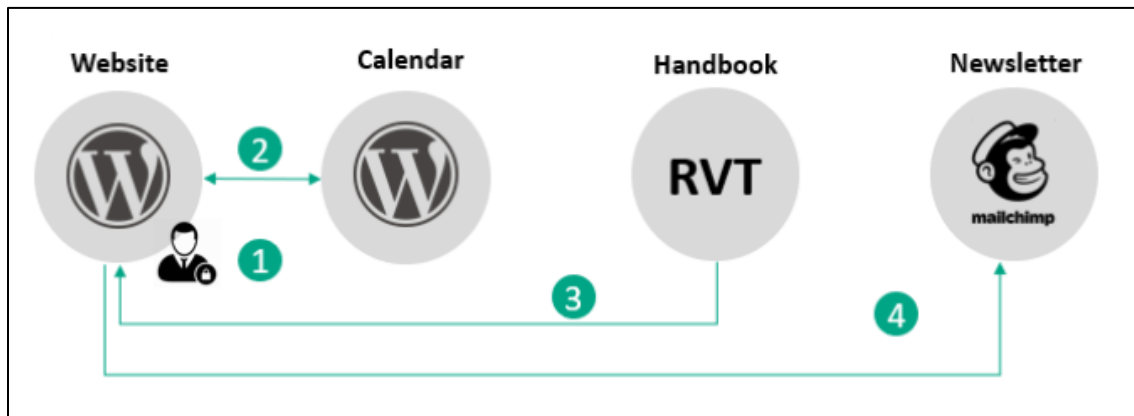## Table of contents

1. System context

The Sphere Website presents information, news and resources on Sphere and its areas of expertise. It also serves as a central entry point to other Sphere applications.

The following figure outlines the envisaged improvements and integration to other systems at a glance.

- **Sphere Website (spherestandards.org)**

  The website is built with Wordpress. The theme is a custom development for Sphere. Currently, all contents are public as no login functionality is implemented yet (1). It is envisaged to connect the website to a central User Management system.

- **Sphere Calendar (spherecalendar.org)**

  The current calendar is built with Wordpress, but is operated on a different instance than the website. Users need to have an account in order to create new events. Currently, there is no connection to the Sphere website (2). It is envisaged to connect event data (Calendar) with associated Trainers (Website).

- **Interactive Handbook (handbook.spherestandards.org)**

  The Interactive Handbook was built in 2018 with a COTS (commercial of the shelf) solution provided by River Valley Technologies. Currently, no user login functionality is implemented to allow for user comments. It is envisaged to connect the Interactive Handbook to the Website to allow for a global search on Sphere contents (3).

- **Sphere Newsletter (Mailchimp)**

  Sphere is providing monthly and special newsletters via Mailchimp. Users need to subscribe to the newsletter via the Website being forwarded to a Mailchimp registration page. Currently, users need to retype all information after being forwarded to Mailchimp as no API connection is established yet (4).

2. Functional Requirements

2.1 Sphere Calendar with enhanced event data structure

Sphere has already implemented a calendar ((http://spherecalendar.org/events/). The calendar is running on a separate Wordpress instance and is implemented using a standard plugin (https://theeventscalendar.com/product/wordpress-events-calendar-pro/).

It is envisaged to fully integrate the calendar into the website out of different reasons, e.g. events (calendar) need to be connected with trainers, focal points and members (website).
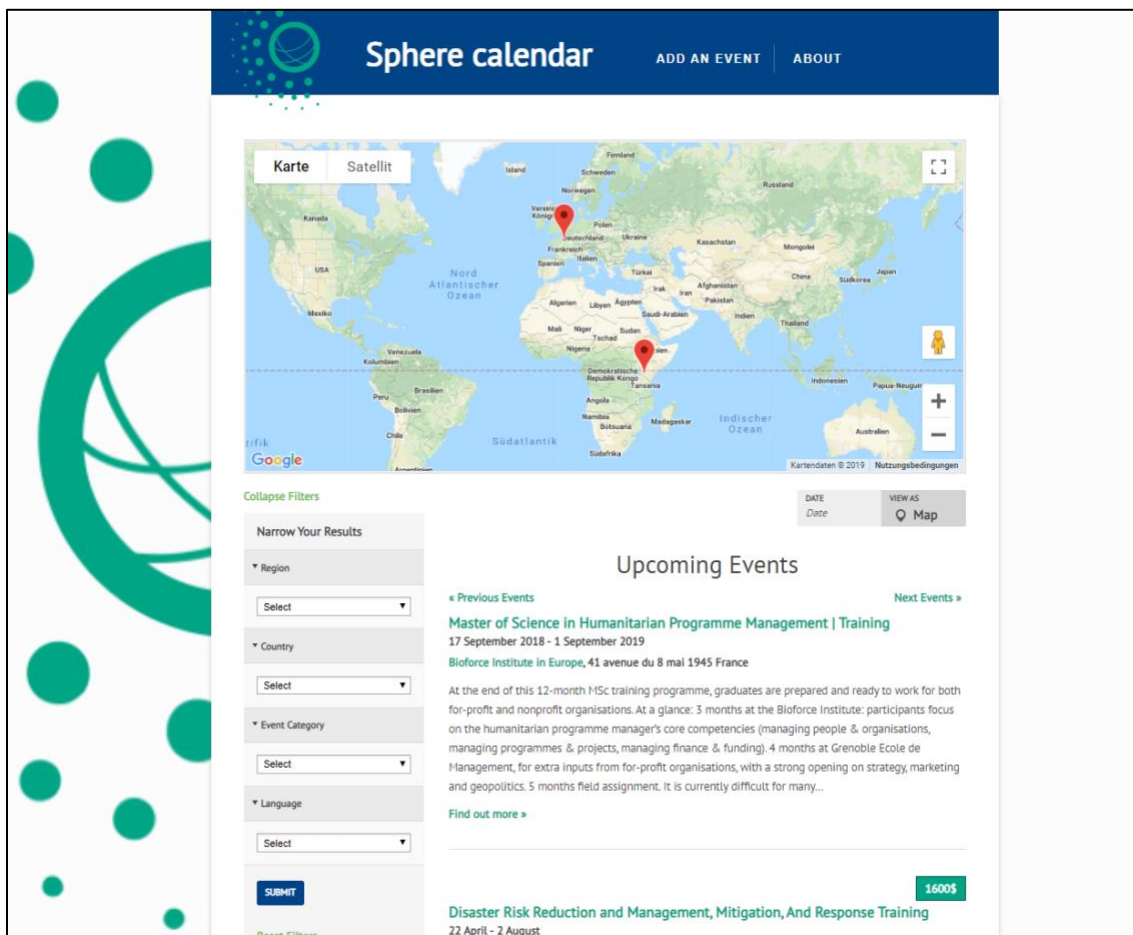
The functionality of the current calendar is mostly fit-for-purpose and needs to be rebuilt in the Sphere website. Bidders are free to use the current plugin or propose other implementation options.

The look and feel of the calendar needs to follow the style guidelines of the Sphere Website (https://spherestandards.org). The successful bidder is expected to propose a screen design of the user interface as part of this assignment.

The main use case of the calendar is an event booking system (existing functionality):

- **Create events**

  - Registered users have the ability to submit events

  - Event structure

    - Title (required)
    - Description (required)
    - Event Category (Multiple Choice)
    - Event Time and Date
    - Venue Details (free text; select or create)
    - Organiser Details (free text; select or create)
    - Event website
    - Link to registration form
    - Country (Single Choice)
    - Region (Single Choice)
    - Language (Single Choice + other)
    - File attachments

  - Events will be moderated before publishing. Some authors have a standing permission to publish.

  - Admins can edit all events before and after approval, including deleting and uploading files

  - Admins are able to scan user uploads for viruses before approving an event

- **Find events**

- o Map view with upcoming events, list view and month view

- o Events are filterable by region, country, event category, language, organisers and date

- o Keyword search to find events

- **Event detail view**

  - o Event preview (title, date, venue, organiser and short description) is displayed on home screen

  - o "Find out more" button to switch to detail view

  - o All event details are displayed including map

  - o Option to download *Google Calendar* or *ICAL Export* files

Home screen of calendar (search for events; map view; upcoming events)

Home screen of calendar (month view; current implementation)

Master of Science in Humanitarian Programme Management | Training

17 September 2018 - 1 September 2019

« Humanitarian Programme Manager training   Training on Effective Monitoring & Evaluation for Public and Donor-Funded programmes »

At the end of this 12-month MSc training programme, graduates are prepared and ready to work for both for-profit and nonprofit organisations. At a glance:

- 3 months at the Bioforce Institute: participants focus on the humanitarian programme manager's core competencies (managing people & organisations, managing programmes & projects, managing finance & funding).

- 4 months at Grenoble Ecole de Management, for extra inputs from for-profit organisations, with a strong opening on strategy, marketing and geopolitics.

- 5 months field assignment.

It is currently difficult for many humanitarian and development organisations to recruit and retain skilled programme managers. These difficulties directly impact the efficiency of their programmes. Over recent years there has been increased attention given by humanitarian and development agencies to the quality of humanitarian and development practice and raised awareness of the importance of ensuring programme quality in the sector. The Bioforce Institute has been actively involved in these developments through extensive consultations on the challenges faced by NGOs. Developing their ability to hire, develop and retain competent managers has been recognised as a top priority. Both humanitarian and development organisations as well as individuals expressed the need for training programmes that enable potential and current managers to develop their technical, analytical and personal skills.

The partnership between the Bioforce Institute and Grenoble Ecole de Management has enabled the creation of a substantial management training programme for the humanitarian and development sector, offering trainees an academic qualification and the specific expertise they seek. Grenoble Ecole de Management is recognized in France and abroad as a leader among French business schools and brings to the training programme its expertise in management, innovation and entrepreneurship.

Attached File/s

+ GOOGLE CALENDAR   + ICAL EXPORT

Details

Start:
17 September 2018

End:
1 September

Event Category:
Course/Workshop, face-to-face

Website:
http://humanitaire.institutbioforce.fr/fr/node/88

Organiser

Bioforce Institute

Email:
info@institutbioforce.fr

Website:
http://humanitaire.institutbioforce.fr/en

Other

Country
France

Region
Europe, Western

Language
English

Venue

Bioforce Institute in Europe

41 avenue du 8 mai 1945 France
+ Google Map

Website:
http://humanitaire.institutbioforce.fr/en

Event details view (current implementation)

Sphere calendar

ADD AN EVENT | **ABOUT**

Not *Olaf Haasner?* Log Out

EVENT TITLE: *(required)**

EVENT DESCRIPTION: *(required)**

Visual | Text

Paragraph ▾ | B | I | ≔ | ≡ | 66 | ≡ | ≡ | ≡ | 𝒫 | ⬚ | ⊞ | ✕ | ▦

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EVENT CATEGORIES

- ☐ Conference
- ☐ Consultation (Handbook revision)
- ☐ Course, online/e-learning
- ☐ Course/Workshop, face-to-face
- ☐ Discussion panel
- ☐ Humanitarian Standards Partnership (HSP)
- ☐ Sphere governance meetings
- ☐ Sphere Handbook Launch
- ☐ Training of trainers

Show all categories (11)

EVENT TIME & DATE

Start/End:

07/02/2019 | 8:00am | to 5:00pm

07/02/2019

Timezone: UTC+0

☐ All Day Event

This event is from 08:00 to 17:00 on 2 July 2019.

VENUE DETAILS

Use Saved Venue:

Select or Create a Venue ▾

Show Google Map: ☐

Show Google Maps Link: ☐

ADDITIONAL FIELDS

Country: | None ▾

Region: | None ▾

Language: | None ▾

Language (if none of the above):

FILE ATTACHMENT 1

Only accepts PDF or Word files.
File may not exceed 300 MB in size.

Attached File:
Course-Focus_RedR-India.docx

Change the attached file by choosing another file below.

Datei auswählen | Keine ausgewählt

Event registration form (current implementation)

The existing functionality as described on the previous pages needs to be fully implemented. In addition, the following enhancements need to be implemented:

- **Adapt event data structure (additional fields)**
  - Split event categories (Training and Learning events / Other events)
  - Delivery mechanism (Single choice, e.g. webinar, face-to-face)
  - Relevance to Sphere content (Full, Partial, None)
  - Registration Deadline (Date)
  - Event type (Single choice, public or private)
  - File attachment type (select type when uploading file)
  - Roles
    - Lead facilitator (select from list of trainers on Sphere website; free text for unlisted trainers)
    - Cofacilitator (select from list of trainers on Sphere website; free text for unlisted trainers)
    - Guest speaker (select from list of trainers on Sphere website; free text for unlisted trainers)
    - Organizer (select from list of focal points on Sphere website; select or create for others)
    - Host (select from list of focal points on Sphere website; select or create for others)
  - (...) Details will be specified during the inception phase
- **Add filters according to adapted event data structure** (e.g. by Sphere content)
- **Implement link between events and trainers** (when clicking on trainer in event screen, redirect user to trainer profile page
- **Show past events** (possibility to search / find events in the past)

2.2 Newsletter subscription mechanisms

Sphere is using the cloud-based newsletter solution Mailchimp to manage subscriptions and distributing monthly or special newsletters. To increase the number of newsletter subscriptions, several possibilities to sign-up need to be implemented in the Sphere Website. The information entered in the context of the Sphere website needs to be forwarded to Mailchimp via API.

- **Configure API connection to Mailchimp**

Mailchimp offers a well-documented RESTful API (https://developer.mailchimp.com/) with two different authentication methods: OAuth2 or HTTP Basic Auth. The **eMail**, **Name** and **selected preferences** provided via input forms on the Sphere website need to be submitted to Mailchimp. Subscribers will receive a message via Mailchimp that the subscription was successful. The message also provides instructions how to unsubscribe.

- **Implement subscription box in Website footer**

When clicking on an eMail input field in the website footer, a form collapses. Users provide the following information to subscribe to the newsletter:

  o eMail (required)
  o First Name (optional)
  o Last Name (optional)
  o Language preference (required)
  o Marketing permissions (required)
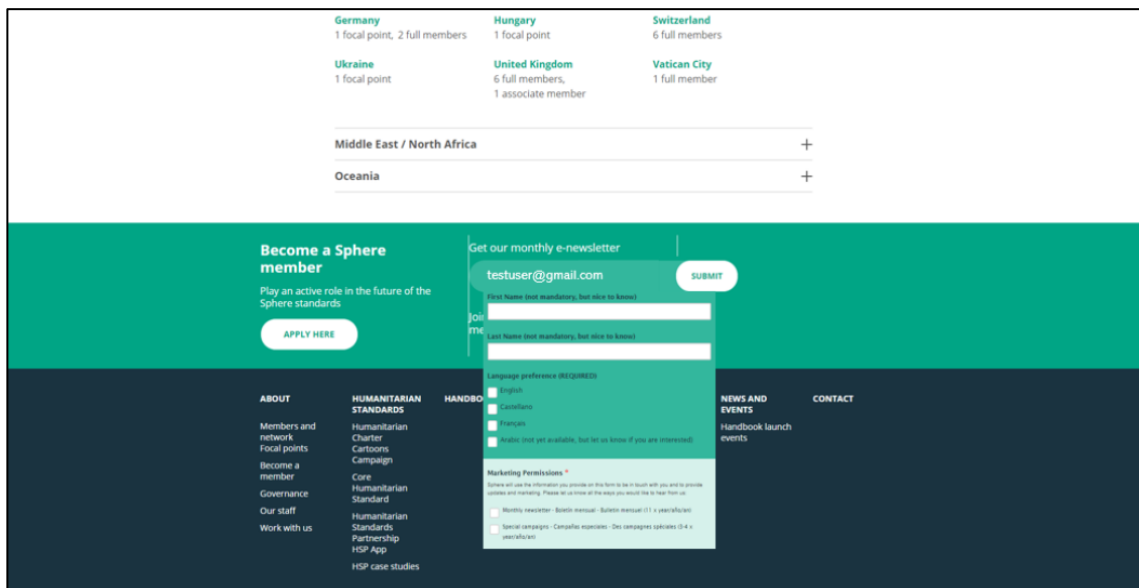
- **Implement subscription popup after 1,5 min of browsing**

When a user is browsing for 90 sec on the Sphere Website, a newsletter Pop-up will be displayed. The Pop-up can be closed by clicking on the "X" in the top right corner. Users should not get displayed the Pop-up in the following cases:

  o Pop-up was already closed in the same browser session
  o User is already subscribed to newsletter (e.g. store cookies in browser)
  o User is logged-in (i.e. already set newsletter preferences in registration form)

- **Implement subscription popup when downloading resources**

  When downloading resources form the Sphere Website, a Pop-up appears asking for newsletter subscription. Users have the option to only download the resource or subscribe to the newsletter in parallel. Users should not get displayed the Pop-up in the following cases:

  - User is already subscribed to newsletter (e.g. store cookies in browser)
  - User is logged-in (i.e. already set newsletter preferences in registration form)
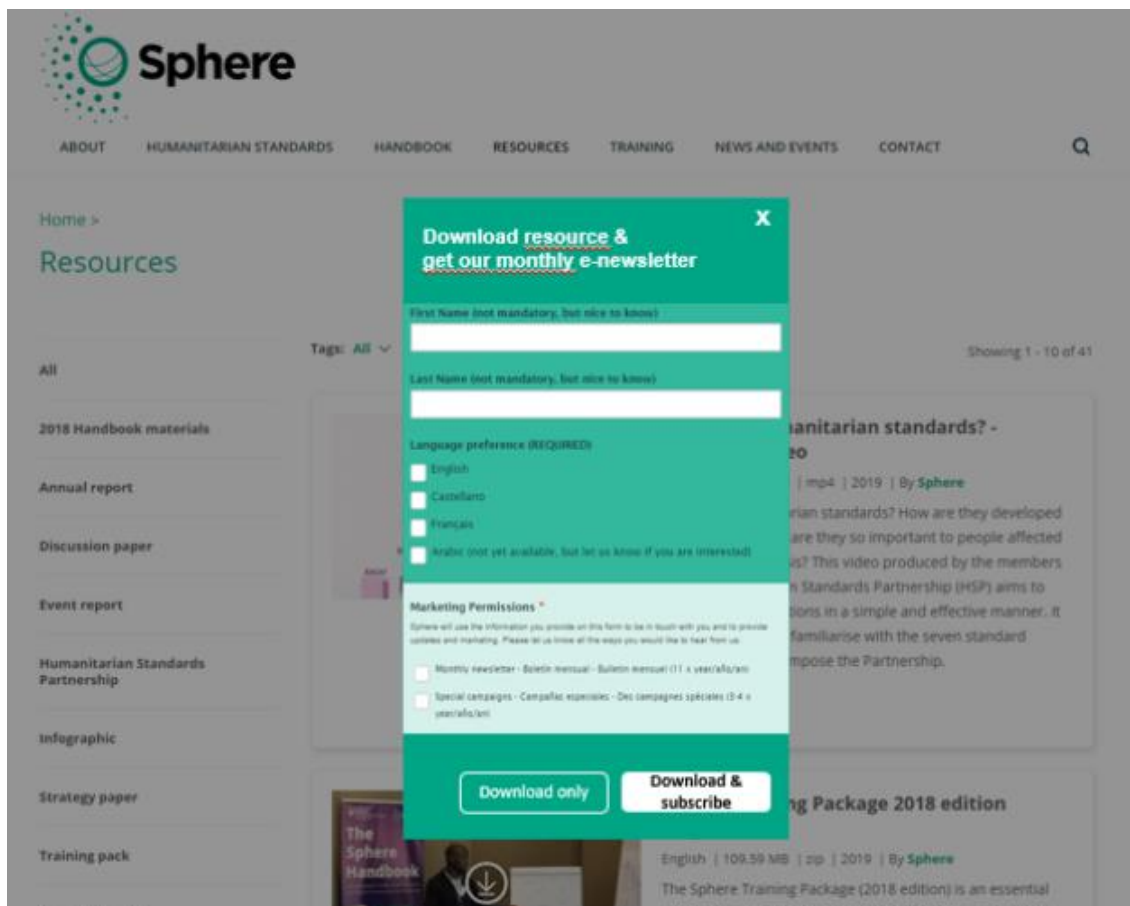
- **Implement subscription option in user registration form (UMS functionality)**

    Users should have the possibility to subscribe for the newsletter as part of the registration process. The registration form is part of the UMS. If a bidder only submits a proposal for this component (and not the UMS), this requirement is out of scope.

Security features to avoid abuse by bots or similar need to be considered when implementing the subscription forms (e.g. captcha before submitting; details will be discussed during the Inception phase).

2.3 Profile pages for Trainers / Focal points

Profile pages for Sphere Trainers are already implemented in the Sphere website, but can only be edited by Admins.

- **Adapt structure of trainer profile page**
    - Add new role for trainers to edit own profile
    - Add functionality to edit trainer profile in the website frontend
    - Implement connection to calendar to display events connected to trainer on profile page (see 3.2)
    - Show past and upcoming events of trainer on profile page
    - Add filter to show upcoming events only
    - Redirect to event in calendar when clicking on title of event

- **Add trainers to the map view on the Sphere website** (continents and countries)

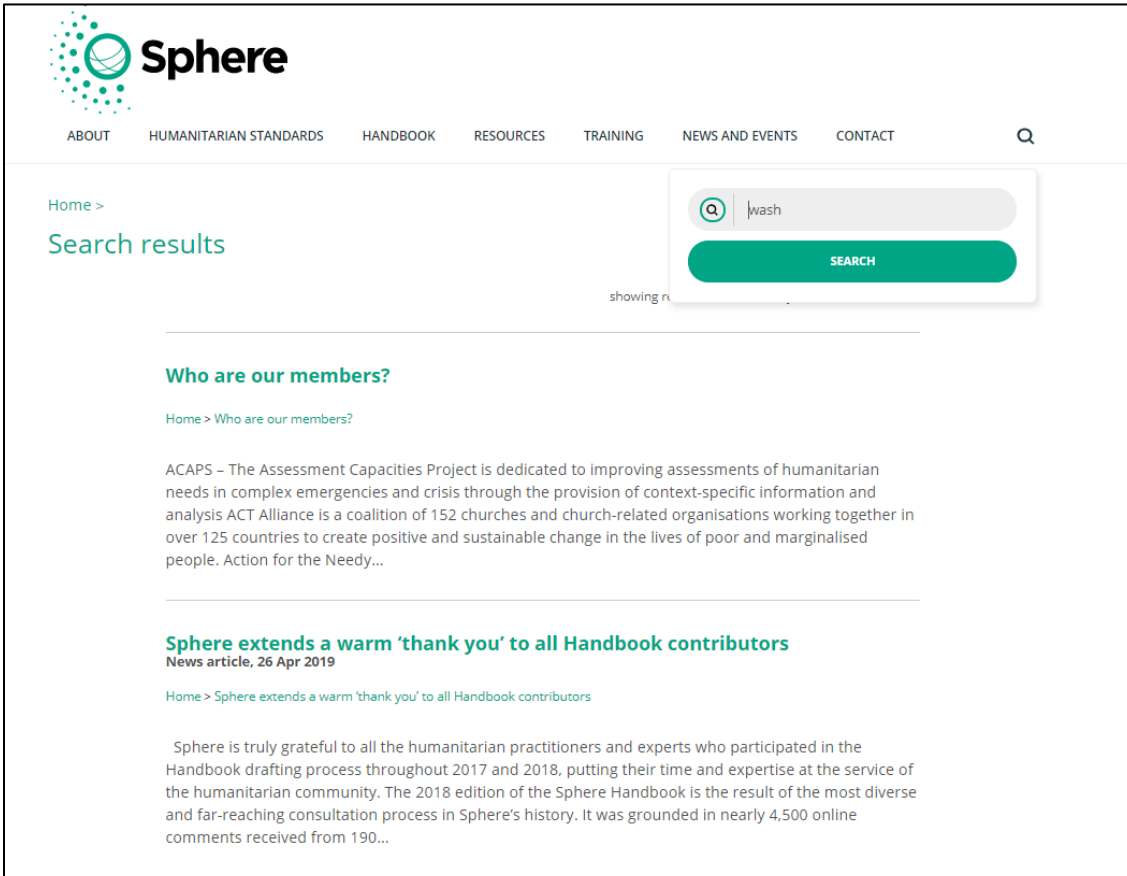- **Show trainers on overview page** when drilling down in map from region to country
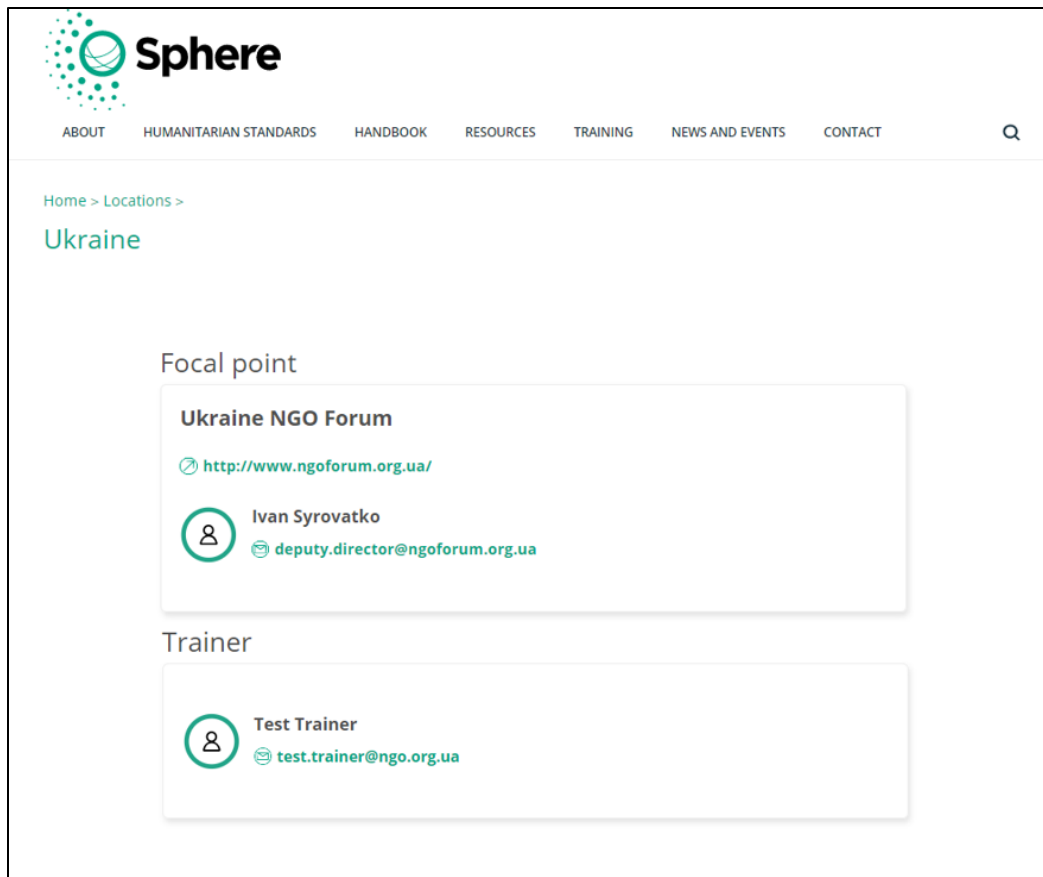
- **Design and implement focal point profile page**
  - Add new role to manage profile page of a focal point (assign to existing user)

- o Implement template for focal points (Organisation, website, description, workplan table etc.)

- o Implement file upload to focal point profile page

- o Implement reminder, if contents are outdated on the focal point profile page (e.g. the workplan needs to be updated every year by 30. November. If the workplan is not updated annually, a status and info message should indicate, that the information is outdated)

2.4 Advanced search including results from Interactive Handbook

The Sphere website currently offers a full-text search displaying all search without categorisation.

An advanced search needs to be implemented including the following features:

- • Filter search results by resource types (e.g. content, document, video)

- • Filter results by source (Website sections or external sources [Interactive Handbook]

Bidders are encouraged to propose solution approaches to implement a faceted (facets = resource type and source) across different Sphere platforms. In scope of this assignment, the search should include results from the Sphere Website and Interactive Handbook.

The Interactive Handbook offers a RESTful search API allowing to query results of the Sphere Handbook. Alternative solution approaches shall be considered, such as integrating entrerprise-search platform (e-g- Apache Solr, Elastic search, etc.) allowing federated search and real-time indexing across different platforms.

2.5   Resource uploads by users

Registered users should be able to upload resource to the Sphere website. When uploading resources, users need to specify the category, provide further information and agree to the terms and conditions.

- Add functionality to upload resources by type and language

- Design templates to upload resources (upload forms; currently two different types are planned: *upload a document* and *tell us about a resource*)
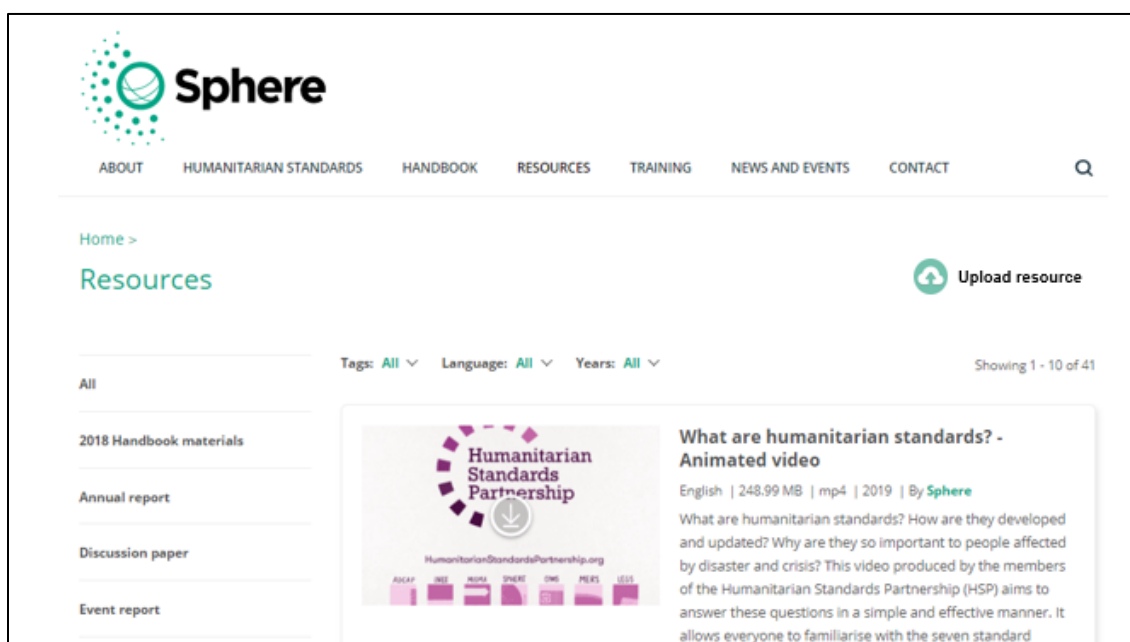
Upload a Document

Sphere welcomes your submissions of training materials, assessment tools, posters, annual reports, and any other files that are of interest to our practitioners. Sphere is committed to cataloguing and promoting useful documents, so they reach the people that need them.

Please fill in this form in the local language of the document.

*Title		title
*Language		language
*Document type		document_type
*Description		description
*Date	Describe the age of the document, e.g. "Updated 2018", "New for 2018", "2018", "January 2018".	date_display

Provider	If you are uploading on behalf of an organisation, enter their name. You must have the permission of the owner before uploading. If there are more than one owners, enter all of them separated by commas.	provider
Tags	To make your document easier to find, select from the tags listed or create your own.	tags
Further Information	If applicable, provide the URL for a webpage which contains background information about the document.	info_link

Choose File |

☐ I have read and agree to the terms and conditions relating to uploading a document to the Sphere website.

Submit

Tell us about a resource

Do you host or manage an online resource of interest to Sphere practitioners, e.g. an e-learning, a video, a forum, a document, an encyclopaedia or another kind of digital asset? Once accepted, your resource will appear in search results (as a hyperlink) and may be featured on other pages.

*Title		title
*Language		language
*Resource type		sub_type
*Description		description
*Date	Describe the age of the document, e.g. "Updated 2018", "New for 2018", "2018", "January 2018".	date_display
*Link	Enter the download link of the document or the landing page for the online resource.	link

Provider	Which organisation or organisations control this resource? Separate multiple owners using commas.	provider
Tags	To make your resource easier to find, select from the tags listed or create your own.	tags
Further Information	If applicable, provide the URL of a webpage which contains background information about the resource.	info_link

[Dynamic additional fields depending on resource type selected:]

e-learning	*Estimated study time	Plain text
	*Target audience	Formatted text
Mobile app	Download size (Mb)	Integer
	Apple Store link	Plain text (URL)
	Google Play link	Plain text (URL)
	Microsoft Store link	Plain text (URL)
Document	*Document type	[Selection as per ADVANCED SEARCH screen]
	*Filename	Plain text
	*File type	Plain text
	*File size (Mb)	Integer
Online handbook, order-form, forum, encyclopaedia, glossary, website/webpage, other online tools	[No additional fields]	

By clicking Submit, you accept to being contacted by Sphere to discuss your submission.

Submit

2.6   Further improvements

Bidders are expected to include a budget of 30 days for further improvements and (smaller) ad-hoc change requests. The details will be specified on a rolling basis during the implementation phase. Initial ideas for further improvements are:

- New restricted pages for members and board members
- Search Engine Optimisation (SEO)
- GDPR / Cookies consent feature