FAO/RFI/IPPC

Request for Information (RFI) for identifying Software Providers for a Multi-level and Distributed Documents Authoring, Revision and Commenting Workflow Management Platform

> ## Closing Date: Wednesday, 20 February 2015, 12:00 hrs Rome time

Introduction:

The purpose of this Request for Information (RFI) is to obtain information on the availability of software products for replacing the current Online Commenting System (OCS), a collaborative, multi-level and distributed documents authoring, revision and commenting workflow management platform. The new Online Comment System (OCS) should be a **simple, efficient, user-friendly online system to share, submit and compile comments on documents.**

The software product shall satisfy the requirements described in Annex 1 attached hereto.
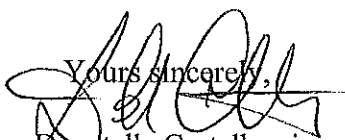
Information requested

We kindly request you to provide us with the following information:

- Brief general information of your company, years in business and focus, experience in providing such or similar software products.
- If you can provide a software product as described in Annex 1, describing the details/features/functionalities of such product;
- If there are any specific requirements that your company cannot meet;

    PLEASE DO NOT PROVIDE ANY COSTS OF THE PRODUCT OFFER AS THE ORGANIZATION INTENDS TO ISSUE A TENDER BASED ON THE RESULTS OBTAINED THROUGH THIS REQUEST FOR INFORMATION.

The information shall be sent by email to: CSAP-Contracts-Group@fao.org by the closing date 20 February 2015, 12:00 hrs Rome time.

Should you have any question, please refer to this email address: CSAP-Contracts-Group@fao.org.

Yours sincerely,

Donatella Castellucci

Request for Information to review and comment on documents

1.1 This request is raised by the Secretariats of the International Plant Protection Convention (IPPC) and Codex Alimentarius (Statutory Bodies of FAO). The objective of the request is to receive information on the availability of software products for replacing the current Online Commenting System (OCS), a collaborative, multi-level and distributed documents authoring, revision and commenting workflow management platform.

The new Online Comment System (OCS) should be a **simple, efficient, user-friendly online system to share, submit and compile comments on documents.**

It shall satisfy the following requirements.

1.1.1 Requirements for OCS Users

Level 1 users (OCS Manager).

    Main function. Level 1 users are mandatory users who should be granted access to documents once they are open for commenting, with the capacity to submit them to the Secretariat. They can add level 2 and level 3 users to the document review and comment process.

    Interacting with the draft. Level 1 users shall be presented the following options while interacting with the draft:

    - *Save as draft*: to temporarily save the work done and resume it later

    - *Cancel*: to discard the work done without saving

    - *Save and Verify*: to include in the final submission comments sent by Level 2 and 3 users

    - *Share Comment(s)*: to share comments internally within the belonging review group and externally with other groups

    - *Submit to Secretariat*: to send all verified comments to the Secretariat

Level 2 users (Assistants).

    Main function. Optional users that can be created by the OCS Manager and appointed to comment on one, more or all documents open for commenting. Assistants can appoint one or more Commenters (level 3 below.

    Interacting with the draft. Level 2 users shall be presented similar options as per the above level. So, they should be able to save their work as drafts, discard all added modifications and explanations or send their comments to Level 1 users. In addition, Level 2 users should also have the option to select comments from Level 3 users (Commenters), once they receive them.

Level 3 users (Assistants).

Main function. These users are at the third level of the hierarchy and can be added by one of the higher level users. Commenters automatically belong to the group of the user who added them into the system and may not interact with the other groups directly (unless invited by Level 1 and 2 users of another group). These users, once registered, will have the possibility to add comments upon invitation by the OCS Manager, Deputy or Assistant on a specific draft.

Interacting with the draft. Level 3 users can only save, discard or send their work to the next available Level of users. Level 3 users can also see each other's comments as they are saved as drafts by default.

1.1.2 Requirements for admin role (secretariats)

Main Function. This role will administer users, invite for comments and compile received comments.

OCS users are invited to review the documents and provide comments on the basis of the 3-levels workflow presented in the Annex.

Admin privileges will be needed for:

- creating groups in the system
- creating Level 1 users
- uploading documents for commenting
- defining the schedule for commenting (insert start and end dates of commenting periods)
- inviting Level 1 users to comment on drafts
- receiving compiled comments automatically at the end of each commenting period
- formatting drafts within the system, possibly allowing the system to generate paragraph numbers, but not changing the text to a table format.

"Imitating other users" facility shall be available in order to check and solve possible problems.

Easy compilation of comments for Secretariats without losing the original draft and easing the work of the Secretariat to compile, format, post the comments will be essential.

A compiling tool shall be provided to handle the comments received and able to generate an output similar to the following scheme, available for download in Excel, PDF and Word:

Comm. n.	Para. n.	Comment type	Original text	Modified text	Member explanation	Author (group)

1.1.3 General requirements

Compatibility with mobile devices and main browsers. The OCS shall be compatible with mobile devices and all main browsers, namely IE9 and above, Firefox, Safari, Opera, Chrome.

Multilingual system (running in six languages). OCS shall support the six FAO official languages (Arabic, Chinese, English, French, Russian and Spanish), with versions of the same document being open for comments simultaneously.

User registration and management system (desirable to also have a future integration for user identification and permission through the IPPC and Codex Alimentarius websites).

Possibility to configure (customize) the system to allow IPPC and Codex Alimentarius secretariats to brand the system as their own and do minor adjustments to suit their needs as well as the option to turn certain features on and off. Capability to add organizations in the future should also be allowed.

Different user types, with one user having one or more roles. Users will be grouped under different types (see Annex 1) and may have more than one role.

Easy documents view. Users should have direct access to drafts open for commenting, which should always be up-to-date. In addition, each document should be visible on one page through a scroll-down bar, just like a word document.

Formatting: Text for each document would be loaded and formatted with paragraph numbers and the ability to check and compare language versions for matching paragraphs should be possible.

Four types of comments will be allowed on each paragraph shall be automatically split into when the Secretariat upload it. The Secretariat can open documents just for some types of comments and may also choose not to open some paragraphs for comments.

Availability of notifications OCS-related with a user-friendly format, similar to social networks mailing.

Ability for users to search for: i) other users in the same group or for all users; ii) for documents currently open for commenting; iii) for internal comments on documents whose commenting period is over.

Ability to export data in the most common formats (i.e. Microsoft Office Word or Excel, PDF, etc.).

Availability of Statistics on submitted comments and on the users.

OCS User Structure

Secretariat

SUBMISSION
only available for OCS Manager

OCS Manager
(mandatory, only one per group)

OCS Deputy
(optional, only one per group)

Available action(s): **VERIFYING,** Appointing, Commenting, Sharing

Level 1

Assistant
(optional, only one per draft)

Available action(s): **SELECTING,** Appointing, Commenting, Sharing

Level 2

Commenter(s)
(optional, as many as needed per draft)

Available action: **COMMENTING**

Level 3