Call for tender: Ensuring the Future of EUPATI (EFOEUPATI)– EUPATI Patient Education and Engagement Portal

11/12/2018

Last updated with questions & answers: 22/01/2019

European Patients' Forum • Chaussée d'Etterbeek, 180 • 1040 Brussels • Belgium
Office Phone Number: +32 (0) 2 280 23 34 • Email: info@eu-patient.eu • www.eu-patient.eu

A STRONG PATIENTS' VOICE TO DRIVE BETTER HEALTH IN EUROPE

Contents

1. EFOEUPATI – Ensuring the Future of EUPATI

The **European Patients' Academy on Therapeutic Innovation (EUPATI)** was funded by the Innovative Medicines Initiative in the period February 2012 to January 2017 (known as well as IMI-EUPATI Project 2012-2017). It aimed to trigger a **major rethink in the way patients and the public understand the medicines development process and their own involvement therein**. Armed with a deeper understanding, **patient experts and advocates will be empowered** to work effectively with the relevant authorities, healthcare professionals and industry to influence the medicines development process for the benefit of patients.

Ensuring the Future of EUPATI (EFOEUPATI) is a project funded under the Innovative Medicines Initiative 2 (IMI2), grant agreement number 806995. The project will run from 1 September 2018 until 31 August 2020 and it aims to ensure **optimal exploitation and sustainability of the core achievements of the IMI-EUPATI Project 2012-2017**: Patient Expert Training Course, the multilingual public Toolbox, and the EUPATI National Platforms Network (ENP). It is imperative that these pillars exist in the medium- and long-term to address the growing field of patient engagement. The project is co-lead by the European Patients' Forum (EPF) and Bayer.

One of the objectives of the project is to **create a Patient Education and Engagement Portal that will host relevant information and resources for patients and other stakeholders to ensure meaningful and value adding patient engagement in medicines R&D.** This will end up replacing the existing EUPATI website www.eupati.eu which focuses on the delivery of the Patient Engagement Toolbox, ensuring it meets the future needs of the Patients' Academy.

2. EPF – General Information

The European Patients' Forum (EPF) was founded in 2003 to ensure that the **patients' community drives policies** and programmes that **affect patients' lives to bring changes empowering them to be equal citizens in the EU.**

EPF currently represents **70+ members**, which are **national coalitions of patient's organisations and disease-specific European platforms**. EPF reflects the voice of an estimated 150 million patients affected by various chronic diseases throughout Europe.

EPF's vision for the future is that **all patients with chronic and/or lifelong conditions in the EU have access to high quality, patient-centred equitable health and social care**.

3. Purpose of the Tender

The purpose of this call is to **invite tenders for the contract of web developer/service provider** that will **design and develop a Patient Education and Engagement Portal**, based on the user, functional, and data management requirements attached to this call (please see section 5 – Requirements).

The portal **will provide information on the involvement of patients in medicines research and development processes, and support all stakeholders in these activities, including providing an infrastructure for Alumni of the EUPATI Patients Expert Course to collaborate with each other and third-parties.** The site will provide reusable educational information, and resources as well as tools, guidance and standards developed by existing and future and initiatives for the patient community and the stakeholders with whom they interact.

The **EUPATI.eu** Patient Education and Engagement Portal will enable users (patients, industry and academia) to:

- **Identify what training material, educational content, tools, templates, guidance**, etc are available **to increase their effectiveness** and **add value during their involvement in the medicines research and development process;**
- Identify **synergies and opportunities for collaboration** with different stakeholders;
- **Provide resources and connections in an innovative, reusable, and multilingual way** to enable wider and more effective engagement.

The **EFOEUPATI team will work with the web developer throughout the design and development phase to ensure all individual sections of the portal match the requirement specified**. Strict quality checkpoints, including ethical review of the design of the system and its data management, will be enforced to ensure that pre-defined requirements are achieved.

Once the portal is populated with content representative of the full site, **user testing will be conducted with volunteers from the EUPATI consortium, EUPATI National Platforms, and the EUPATI network**, to assess whether the site meets the user requirements. Timely user testing will ensure that any remedial action can be taken with the developer to ensure that the requirements are met. After the completion of user testing, the site will be populated with all remaining content and additional users performing administrative and moderation roles will be trained before a seamless transition from the existing EUPATI websites to the new Patient Education and Engagement Portal. The completed portal will be validated against the requirements, including any changes that were made throughout the process.

4. Description of Services

The following tasks will need to be carried out:

- **Design and develop a Patient Education and Engagement Portal** based on the user, functional, and data management requirements attached to this call (see section 5);
- Take in consideration the different **use cases in the design phase of the portal** (patient community and industry, regulators, National Platforms, etc.);
- **Test the new Portal** with different users (EUPATI Alumni, ENPs, EUPATI Consortium, New users, etc.);
- **Launch of the Patient Education and Engagement Portal**;
- **Migrate the different existing EUPATI sites to the Portal** (Toolbox - eupati.eu, Training Course - edu.eupati.eu, ENPs - e.g ch.eupati.eu, etc.).

5. Requirements of the Portal

Applicants should consider the requirements attached to this Call for Tender in their proposals. The requirements table includes information on the functionality, user profiles, and other elements that the EUPATI.eu Portal should provide.

5.1 CURRENT SYSTEMS

EUPATI currently uses a number of systems to achieve its aims, and often enjoys NGO status for licenses.

The EUPATI Toolbox/website (www.eupati.eu) and ENP subsites (e.g. https://ch.eupati.eu/) are currently hosted on Wordpress. Multilingual functionality is implemented using WordPress plugins. The EUPATI Patient Expert Course is hosted on a Moodle learning management system (https://edu.eupati.eu). Transactional emails are dealt with in Sendinblue. Internal EUPATI work takes place on a combination of Box.com, Bitrix, and Office365.

6. Participation in the Tendering Procedure

6.1 TENDER PROCESS

EPF reserves the right to conduct the tender process and select the successful tender. EPF is not bound contractually or in any way to a bidder to this request for tender until EPF and the successful winner have entered into a written contract.

6.2 DOCUMENTS TO BE SUBMITTED

The tender proposals should include:

- An **outline of the approach that will be taken to establishing and delivering the project**;
- **Details of the individuals** who will lead, manage and deliver the project and details of their experience, formal qualification and knowledge in web development/design;
- **Detailed costs**;

- **Timetable and quality gates** for the project;
- Applicants should include **background material to demonstrate the previous experience** and range of work of the consultant(s) and/or of the specific personnel proposed for the work; This can include descriptions and examples of previous relevant work;
- **Proposal for data management** to ensuring compliance with all relevant legislation;
- Tenders should also include **contact details of two referees**.

Document applications must be sent by **8th February 2019, 23:59 CET**. Please contact Camilla Habre (camilla.habre@eu-patient.eu) if there are any queries regarding the call.

Closing Date for acceptance of application is 8th February 2019, 23:59 (CET)

Applications can be submitted by post to European Patients' Forum, Chaussée d'Etterbeek 180, 1040 Etterbeek, Belgium or by email to camilla.habre@eu-patient.eu. EPF is not responsible for any proposal not received due to technical faults.

6.3 TENDER EVALUATION

Participation in this tendering procedure is open on equal terms to all natural and legal persons fulfilling the above-mentioned eligibility criteria and language requirements. EPF may, at its discretion, extend the closing date and time of the tender.

The selection procedure will be based on the principles of equal treatment, fairness and transparency and on expertise (60%) and price (40%).

All applicants will receive acknowledgement of receipt of their tender and will be informed of the outcomes of the selection process within 30 days following the deadline date. EPF is not obliged to provide reasons for its decision to shortlist; accept or reject any particular tender.

Offers to the tender will be evaluated based on the following criteria:

Criteria	Weighting
Proposed solution to our request based on requirements provided by EPF	40
Credibility and proven expertise in website development	10
Project Planning	5
Proposed Data Management	5
Price	35

Call for tender: Ensuring the Future of EUPATI (EFOEUPATI)– EUPATI Patient Education and Engagement Portal

Ongoing/maintenance costs of systems implemented	5

Applicants must have excellent knowledge of the English language.

6.4 EXCLUSION CRITERIA

Candidates shall be excluded from participation in this procurement procedure if:
- they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- they have been guilty of grave professional misconduct proven by any means which the EPF can justify;
- they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the EPF or those of the country where the contract is to be performed;
- they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;
- following another procurement procedure or grant award procedure financed by the Union's budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

6.5 SCHEDULE

The assignment shall start as from the date of signature of both contracting parties and shall be completed by **August 2020**.

Tender submission and schedule of the work related to Patient Education and Engagement Portal creation:

Launch Tender	*EPF*	December 2018
Close of the Tender	*Applicant*	February 2019
Selection of the applicant	*EPF*	February 2019
Briefing Meeting	*EPF and Applicant*	February / March 2019

Call for tender: Ensuring the Future of EUPATI (EFOEUPATI)– EUPATI Patient Education and Engagement Portal

First phase: Design of Patient Education and Engagement Portal	*Applicant*	August / September 2019
Second phase: User Testing of the Portal	*EPF and Applicant*	January / February 2020
Third phase: Launch of the Portal	*EPF and Applicant*	August 2020

7. Contract Price and Terms of Payment

Quotes for performing this Service are invited from interest parties.

All Prices must be fixed amounts in EUR including VAT and will not be subject to revision.

Costs incurred in preparing and submitting tenders are borne by the applicants and cannot be reimbursed.

8. Quality Issues

In delivering the service the applicant shall ensure the highest quality standards of which EPF shall be the sole judge.

9. Confidentiality and Conflict of Interest

The successful applicant undertakes that they will not at any time, either before or after the termination of this service, use or disclose or communicate to any person confidential information relating to the affairs of EPF. This restriction shall continue to apply after the termination of the service without limit in point of time.

To ensure the independence of terms of their contract, the winning applicant will sign a declaration certifying that they have no conflict of interests in relation to the tasks to be undertaken and undertake to inform Matthew May, EUPATI Coordinator (matthew.may@eu-patient.eu) should this status change.

All data submitted to EPF will be treated in accordance with Belgian law.

10. Terms and Conditions

EPF reserve the right to reject any and all proposals, in whole or in part, to advertise for new proposals, to abandon the need for services, and to cancel or amend this call for tender at any time prior to the

execution of the written contract. EPF reserves the right to waive any formalities in the call for tender process. EPF may respond to questions or provide information from applicants and is under no obligation to provide such responses or information to all other applicants.

By submitting a proposal, the applicant agrees that:
- EPF may copy the proposal for purposes of facilitating the evaluation of the proposal and agrees that such copying will not violate the rights of any third party.
- It will not bring any claim or have any cause of action against EPF based in any misunderstanding concerning the information provided or concerning EPF's failure, neglect or otherwise, to provide the bidder with pertinent information as intended by this call for tender.

The accomplishment of a tendering procedure imposes no obligation on the EPF to award the contract. Should the invitation to tender cover several items or lots, EPF reserves the right to award a contract for only some of them. EPF shall not be liable for any compensation with respect to applicants whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.

The estimated date for the signature of the contract will be in March 2019.

11. Glossary

EUPATI Toolbox – educational content currently found at www.eupati.eu

EUPATI Fellow – A graduate of the EUPATI Patient Expert Training Course. Also referred to as EUPATI Alumni.

EUPATI Patient Expert Training Course – 15-month blended-learning course hosted on a Moodle learning management system.

EUPATI National Platform – ENP for short. ENPs model the EUPATI construct at a national level and are coordinated centrally. Each ENP has their own website.

12. Contact Person and Contracting Authority

For more information, please contact:

- **Matthew May,** EUPATI Coordinator (matthew.may@eu-patient.eu)
- **Joan Jordan**, EUPATI Content and IT Coordinator (joan@eupati.eu)
- **Camilla Habre,** EPF Project Officer (camilla.habre@eu-patient.eu)

Answers to questions will be sent to the question originator and published on this website.

Contracting Authority:

European Patients' Forum (EPF)

Chaussée d'Etterbeek, 180

1040 Brussels – Belgium

www.eu-patient.eu

BE0807.605.667

Registration Address:

European Patients' Forum a.i.s.b.l

Rue Dicks 14

L-1417 Luxembourg

Number F448

13. Questions and Answers

Question 1: We see that a grant of €362,242.50 was given by the Innovative Medicines Initiative for the project. Can we assume that the majority of this is available for the development of the web portal?

Answer: No, the EFOEUPATI project comprises 4 work packages: Coordination, Sustainability, IT, National Platforms. The redevelopment of the website falls within the remit of the IT work package as one of the major deliverables. The 3 operational work packages are equally resourced.

Question 2: What are the audiences of the EUPATI.eu website?

Answer: There are several audiences: users of the Toolbox (patients, public interested on health, etc), EUPATI Trainees, Network partners (National Platforms, Consortium partners, etc), HTA and regulatory bodies.

Question 3: In your vision of the website, do you see WordPress as the main technology platform or are you interested in any other solutions?

Answer: We have had a good experience with WordPress in the past but are also interested to hear about solutions based on other platforms.

Question 4: Do you intend to create a new Portal within the existing EUPATI.eu website?

Answer: No, we aim to replace the current website and integrate different EUPATI platforms/websites (Toolbox, Moodle, Community Groups, etc) providing a simplified user experience.

Question 5: Do you still want to use Moodle for the EUPATI Training Expert Course?

Answer: We want to continue with Moodle that has gotten more user friendly and GDPR compliant. From an administrative perspective, we are happy with the platform and we do not have interest of changing the technology. Changes to the e-learning platform are outside the scope of this tender.

Question 6: How does the hosting services work with EUPATI.eu?

Answer: Our Moodle system is hosted by HowToMoodle, and our website is hosted with WPEngine.

Question 7: What is the timeframe of the tender?

Answer: The deadline for applications is 8 February 2019. If we receive more than 10 proposals we will work with two-rounds of review. Otherwise we will review all the proposals together based on the criteria selection written on the Call for Tender.

Question 8: How does it work for UK-based companies' proposals in the Brexit context?

Answer: We are accepting proposals from all over the world.

Question 9: Would the selected supplier be responsible for migration of all website content (migratable, non-migratable and translations) from your old site to new site? Or will this be an internal process at EUPATI once the new website is built?

Answer: We are open to both possibilities. Ideally, we would like to work with a web developer to design and develop the new EUPATI Portal and migrate all website content to the new platform. EUPATI is responsible for creating content for the site.

Question 10: Timeline. After your decision is done, it seems there's a pause from March to August 2019. We're wondering why?

Answer: Thank you for raising this, and we apologise that this is unclear. There is no intended pause, the first phase should be completed by August 2019. We have been given fairly generous timelines for the whole project, which we choose to pass on to the applicant, we would be open to the portal being developed and launched on MUCH shorter timelines.

Annex 1 - Portal Requirements

Requirement ID	Category	Priority	Requirement	Assigned	Status
EFO_GENERAL_001	General	H	Maintain all similar functionality to existing EUPATI Toolbox/website www.eupati.eu		
EFO_GENERAL_002	General	H	Provide style matching between edu.eupati.eu and www.eupati.eu to provide users with a seemless experience		
EFO_EVENT_001	Events Calendar	M	The portal will allow Event adding via a calendar.		
EFO_EVENT_002	Events Calendar	M	The portal will allow Event updating via a calendar.		
EFO_EVENT_003	Events Calendar	M	The portal will allow Event deletion via a calendar.		
EFO_EVENT_004	Events Calendar	M	The calendar will allow ical and similar format downloads		
EFO_EVENT_005	Events Calendar	M	Users can filter events.		
EFO_EVENT_006	Events Calendar	M	Users can sort events by type, by chronology, by category		
EFO_EVENT_007	Events Calendar	M	The calendar view can be Month/Week/Quarterly.		
EFO_EVENT_008	Events Calendar	L	The calendar will allow to invite people to events.		
EFO_EVENT_009	Events Calendar	L	The calendar will allow attachments and links to be added to event entry		
EFO_EVENT_0010	Events Calendar	L	Events can be marked public or internal.		
EFO_EVENT_0011	Events Calendar	L	Reminders can be sent to event subscribers.		
EFO_EVENT_0012	Events Calendar	M	Users can subscribe to events.		
EFO_PUB_001	Published Material	M	The portal will provide auto indexing of publications mentioning 'EUPATI'.		
EFO_PUB_002	Published Material	M	The portal will allow logged-in users to see a download link next to an article link		
EFO_PUB_003	Published Material	L	The portal will show peer reviewed published content		
EFO_PUB_004	Published Material	L	The portal will provide a distribution workflow for published material.		
EFO_CON_001	Contact us	M	The Contact Us form will appear when a visible box is ticked		
EFO_CON_002	Contact us	M	Part of the form will be to contact or follow us.		
EFO_CON_003	Contact us	M	Part of the Contact Us form will allow users to choose to send a question, suggestion, volunteer to write or propose an article		
EFO_CON_004	Contact us	L	The portal will automatically manage data entered and reply to issues originating in Contact Us via a helpdesk.		
EFO_CON_005	Contact us	L	The Contact Us functionality will have a routing portal to track issues and send to multiple people based a type of question		
EFO_CON_006	Contact us	L	The Contact Us functionality will have a management portal to assign question owner (EUPATI), inform user (resolution via helpdesk)		

EFO_CON_007	Contact us	L	EUPATI owner gets reminder about question resolution if outstanding and this will be made visible to coordinator		
EFO_CAFE_001	EUPATI Fellows	M	The portal will allow EUPATI Fellows to log in (EUPATI Cafe) to a Knowledge management portal and social network		
EFO_CAFE_002	EUPATI Fellows	M	The EUPATI Cafe will operate like a closed FB group with all features (admins)		
EFO_CAFE_003	EUPATI Fellows	M	The EUPATI Cafe will have the ability to download content.		
EFO_CAFE_004	EUPATI Fellows	M	The EUPATI Cafe will give notifications about new posts and option to reply.		
EFO_CAFE_005	EUPATI Fellows	M	The EUPATI cafe will feature a searchable database of fellows (profiles) (local vs disease vs experience vs mindset) and desired experience for matching opportunities. A visual geographic map would be ideal.		
EFO_CAFE_006	EUPATI Fellows	M	EUPATI fellow profiles are self managed and linked to a EUPATI fellow database		
EFO_CAFE_007	EUPATI Fellows	M	The EUPATI cafe will allow fellows to search conferences, opportunities, mentoring, coaching, support portal		
EFO_CAFE_008	EUPATI Fellows	L	The EUPATI cafe will provide a buddy portal to volunteer to help other fellows (via profile) - Provide option to review presentation		
EFO_CAFE_009	EUPATI Fellows	M	The EUPATI Cafe will allow to upload/download content so that presentations can be shared and reviewed, articles can be shared.		
EFO_CAFE_010	EUPATI Fellows	M	The EUAPTI cafe will feature a central list of opportunities (via seperate calendar)		
EFO_CAFE_011	EUPATI Fellows	M	The EUPATI Cafe will have a code of conduct for fellows when taking up opportunities		
EFO_ENP_001	National Platforms	M	The portal will present News & Events for all ENPS (general and individual) uploaded by ENPs or EUPATI staff.		
EFO_ENP_002	National Platforms	M	The portal will allow ENPs to provide feedback		
EFO_ENP_003	National Platforms	M	The portal will allow social media sharing of ENP events and news		
EFO_ENP_004	National Platforms	H	The portal will have an About section for each ENP		
EFO_ENP_005	National Platforms	M	The portal will have an area where ENP members can login and collaborate for each ENP		
EFO_ENP_006	National Platforms	M	The portal will host relevant translations of information for each ENP		
EFO_ENP_007	National Platforms	M	The portal will host a list of Resources/Repository (all included) + case studies for each ENP		
EFO_ENP_008	National Platforms	M	The portal will host ENP country subsites (written in own language if required) if availabile		
EFO_ENP_009	National Platforms	M	The portal will have a Contact Us button for ENPs		
EFO_ENP_010	National Platforms	L	The portal will generate user statistics for ENPs		
EFO_ENP_011	National Platforms	M	The portal will allow the management of participation opportunities for ENPs		
EFO_ENP_012	National Platforms	M	The portal will have a landing page from which all ENPs can be reached (under central EUPATI Management)		
EFO_ENP_013	National Platforms	M	The portal will have a Search functionality across all ENPs		

EFO_ENP_014	National Platforms	M	The portal will manage donations from ENPs		
EFO_ENP_015	National Platforms	M	The portal will provide a link from ENP sites back to toolbox		
EFO_ENP_016	National Platforms	M	The portal host a page of fellows and their respective ENPs		
EFO_ENP_017	National Platforms	M	The portal will host testimonials of those involved in platforms/advocacy from ENPs		
EFO_ENP_018	National Platforms	H	The portal will alert users when new publications are posted by ENPs and when new courses are launched.		
EFO_ENP_019	National Platforms	L▯	The landing page will feature a map whereby each ENP page can be reached.		
EFO_TBG_001	Toolbox Glossary	M	The glossary will have a feedback form where users are asked if they found what they were looking for and can suggest updates.		
EFO_TBG_002	Toolbox Glossary	H	The glossary will have a better search of metadata giving more accurate results than the current implementation		
EFO_TBG_003	Toolbox Glossary	M	The glossary will provide an A - Z listing of terms		
EFO_TBG_004	Toolbox Glossary	M	The glossary will allow searching on intuitive keywords (ie minicourse only known by EUPATI insiders)		
EFO_TBG_005	Toolbox Glossary	M	Provide Intro text for new users and tour of the glossary to know what's available: "What the glossary is?"		
EFO_TBG_006	Toolbox Glossary	M	Intro text needs to be tailored to cover our audiences		
EFO_TBG_007	Toolbox Glossary	M	New glossary content should be flagged		
EFO_TBG_008	Toolbox Glossary	M	Glossary should allow predictive text within search box (linked to existing content)		
EFO_TBG_009	Toolbox Glossary	M	Allow that categories can also be used for search		
EFO_TBG_010	Toolbox Glossary	M	Glossary should feature knowlesge level of article - badge as basic, intermediate, advanced		
EFO_TBG_011	Toolbox Glossary	M	Articles in results field should be flagged by relevance (suggested content flagged)		
EFO_TBG_012	Toolbox Glossary	H	Useful search functionality to provide user with content they require 'ie clinical trials yields many hits'		
EFO_TBG_013	Toolbox Glossary	M	Glossary features "help us to help you" preferences - Preset self selection to help find rspecific content (ie clinical trials)		
EFO_TBG_014	Toolbox Glossary	M	The glossary should feature user log in pinboard (holds useful content - bookmarks)		
EFO_TBG_015	Toolbox Glossary	M	Glossary has copy feature to take select content into ENP pages or other area of site in courses, etc		
EFO_TBG_016	Toolbox Glossary	L	Consider toolbox terminology, clear difference between course.		
EFO_TBG_017	Toolbox Glossary	M	Categorise glossary search results to help filtering.		
EFO_CMS_001	Content Management	L▯	Connect profile to Synapse https://involvement-mapping.patientfocusedmedicine.org/		
EFO_TRA_001	Translation	H	Allow integration with multiple translation services, must provide integration with Lionbridge		

EFO_TRA_002	Translation	L	Sort and filter content to be sent for translation (by category, date created and alphabetised)		
EFO_TRA_003	Translation	L	Allow translation feedback by users so that suggested corrections can be made.		
EFO_TRA_004	Translation	H	Add new languages		
EFO_TRA_005	Translation	M	Version tracking		
EFO_TRA_006	Translation	H	Hide languages		
EFO_TRA_007	Translation	M	Show translations in progress		
EFO_TRA_008	Translation	M	Allow users to suggest translations		
EFO_MOO_001	Course	M	Provide an E-commerce integration for moodle		
EFO_MOO_002	Course	L	Map course content with toolbox to allow signup on search page		
EFO_MOO_003	Course	M	Allow single sign-on from the portal to the Moodle		
EFO_MOO_004	Course	L	Course metrics are reported to portal consortium area		
EFO_MOO_005	Course	L	Course progress is reported to portal consortium area		
EFO_MOO_006	Course	L	Show country distribution of course trainees in portal consortium area		
EFO_MOO_008	Course	L	Track course role/status/consortium role in user profile		
EFO_MOO_007	Course	M	Integrate EUPATI Moodle LMS into Portal (from a user experience perspective)		
EFO_WHAT_001	What is EUPATI	H	For new users primarily - short video (- 30 secs) giving overview of the toolbox		
EFO_WHAT_003	What is EUPATI	H	Give "What is EUPATI for you?" explanation for each user group		
EFO_WHAT_004	What is EUPATI	M	If you want to be trained option redirects to Course		
EFO_WHAT_005	What is EUPATI	M	If you want to be informed redirects to Toolbox		
EFO_WHAT_006	What is EUPATI	M	Provide Sign up option clearly with options for newsletter etc		
EFO_WHAT_009	What is EUPATI	H	Provide subscription option where username and password etc are provided and login is required.		
EFO_SOC_001	Social Media	M	The portal will allow events to be shared to social media platforms		
EFO_SOC_002	Social Media	M	The portal will allow connections and feeds to twitter, facebook, youtube		
EFO_SOC_003	Social Media	L	The portal will generate an RSS feed of a selected category of content		
EFO_SOC_004	Social Media	M	All articles can be liked & shared		
EFO_SOC_005	Social Media	M	The portal will show social media logos in static page but follow scrolling		
EFO_DON_001	Donations	H	The portal will provide a system to accept donations		
EFO_DON_002	Donations	M	It will be clear how the donations are used.		
EFO_DON_003	Donations	H	The donations portal will record mandatory information securely (name, country, date, email) and other information (members etc)		
EFO_DON_004	Donations	M	A Donors list will be posted on the portal		
EFO_DON_005	Donations	H	An anonymous option will be provided when donating		

EFO_DON_006	Donations	M	Donors list will be sorted by year		
EFO_DON_007	Donations	M	A minimum donation will be required to be displayed on public list		
EFO_DON_008	Donations	M	Secure, online payment including recurring payment will be provided (Credit card (must), PayPal (nice to have), Apple/Google Pay (nice to have))		
EFO_DON_009	Donations	M	The portal will feature a fundraising target with visual progress.		
EFO_DON_010	Donations	M	When a donation is made, a confirmation e-mail of thanks with tax details will be generated.		
EFO_EMAIL_001	EMAILS	H	Transactional emails will support attachments		
EFO_EMAIL_002	EMAILS	H	Sign up to newsletter will conform with double opt-in requirements and recapture		
EFO_EMAIL_003	EMAILS	M	Users can configure their communication preference in their profile		
EFO_SUB_001	Sub-sites	H	Offer possibility to translate subsites		
EFO_SUB_002	Sub-sites	H	Subsite can be multilingual		
EFO_SUB_003	Sub-sites	L	Subsite level permissions different from portal level permissions. E.g subsite admin but portal user		
EFO_SUB_004	Sub-sites	M	Allow users to navigate to other areas of the portal easily		
EFO_SUB_005	Sub-sites	M	Add open sub-site in a separate tab option from portal		
EFO_SUB_006	Sub-sites	M	Add consistent search functionality		
EFO_SUB_010	Sub-sites	M	Allow users to subscribe to sub-site newsletter (eg EUPATI CH newsletter)		
EFO_SUB_011	Sub-sites	M	All subsites have a similar look an feel as EUAPTI Portal but allow configuration of some layout features		
EFO_CONS_001	Consortium Area	M	portal can host updates on the projects - progress reports for consortium		
EFO_CONS_002	Consortium Area	M	portal hosts agreements / Governance documents for consortium		
EFO_CONS_003	Consortium Area	M	portal publishes a list of partners		
EFO_CONS_004	Consortium Area	M	portal will allow indication of interest to join consortium		
EFO_CONS_005	Consortium Area	M	portal publishes a list of EUPATI contacts		
EFO_CONS_007	Consortium Area	M	portal has a consortium suggestion box which is managed		
EFO_CONS_009	Consortium Area	M	portal has a FAQ for members		
EFO_CONS_011	Consortium Area	M	portal has a login function for consortium members to access secured consortium area		
EFO_MEM_001	Members Area	M	portal allows members to upload a profile with linkedin integration (nice to have)		
EFO_MEM_002	Members Area	M	portal allows members to upload a photo		
EFO_MEM_003	Members Area	L	portal allows members to upload achievements and position, and tracks achievements assigned by admin or system. E.g consortium member for 5 years, founding member		
EFO_MEM_004	Members Area	M	portal shows a members events history showing the last 5-10 portal pages iewed		
EFO_MEM_005	Members Area	M	portal has a login function for members		
EFO_MEM_006	Members Area	L	portal provides link to bookmarked articles/files /video		

EFO_MEM_007	Members Area	L	portal provides a link to social media accounts		
EFO_MEM_008	Members Area	L	portal provides a favourites area for members to locate frequently used items		
EFO_MEM_010	Members Area	M	portal allows users to sort toolbox results page by article category		
EFO_MEM_011	Members Area	M	portal has members calendar functionality		
EFO_MEM_012	Members Area	M	portal shows members payment history		
EFO_SEA_001	Search	H	Update search functionality according to user needs by use of filters		
EFO_SEA_002	Search	H	Fuzzy word match		
EFO_SEA_003	Search	H	Suggested autocompletion		
EFO_ACC_001	Accessibility	H	Keep the contrast colors at max. *e.g.* do not use grey and soft colors		
EFO_ACC_002	Accessibility	H	Comply with W3C Web Accessibility Initiative technical specifications for accessible website		
EFO_ACC_003	Accessibility	H	Mobile and desktop friendly		

Portal User Types	
New user.	Needs to have an explanation of the services and tools explained to them
Regular user.	Should be encouraged to join EUPATI network
EUPATI Alumni.	Has completed course, SSO account Moodle + Portal, access to alumni café
ENP user.	SSO portal + relevant subsite
Admin.	SSO all systems, different levels of admin definable: subsite, portal, moodle, areas of portal, or combination thereof
Glossary user.	Should be encouraged to explore rest of portal
User with disability.	Will use accessibility functionality of the site
Consortium user.	SSO access to secured consortium area
EUPATI network user.	SSO account, potential to gain access to subsites if they engaged. Ability to manage comms preferences
EUPATI Secretariat	EUPATI staff