OFFICE FOR HARMONIZATION IN THE INTERNAL MARKET

(TRADE MARKS AND DESIGNS)

COOPERATION FUND PROGRAMME SUPPORT OFFICE

PROJECT BRIEF

CF 1.2.11 – Common Gateway for Applications

Version 2.0 – 31 October 2011

Project/Service	OHIM COOPERATION FUND (ICLAD)		
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Approved by owner	MV	Marc Vanaeken	ID Director
Authors	SP	Sonia Pérez Díez	Project Manager, ID
Contributors	CVV	Carolyne Vande Vorst	PSO
	SW	Simon White	Programme Manager
	SD	Sofie Declercq	PSO
	XX	Xavier Xhenemount	SQC Lead
	AA	Angel Aledo	Application Portfolio Manager, ID
	NV	Nicolas Vigneron	Business Lead
	KR	Karolina Raclawska	PSO

Revision History

Version	Date	Author	Description
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0.2	03/03/2011	CVV	Revision of Project Approach and Benefits
0.3	04/03/2011	SW	Revision on structure and contents
0.4	09/03/2011	SP	Feedback from NOs, UAs and internal stakeholders
0.5	08/03/2011	SD	Detailed work on costs and presentation
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0.7	04/04/2011	SP	Further revisions to scope, time plan and profiles
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1.0	11/07/2011	SD	Updated cost and effort Annexes with Working Group data
1.1	21/10/11	SP	Following first Change Management exercise added changes in scope and resources.
2.0	31/10/11	KR	Project Review Editing

Quality Criteria (to be used by reviewers)

Is the document clear and concise?
Is the scope of the project clearly defined?
Are the objectives of the project clearly identified?
Have the proposals of the interested Member States been taken account of?

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1. Project Definition

1.1. Introduction

1.1.1. About this document

This document has been produced to capture the scope, investment needed, dependencies on other projects and benefits so that the **Project** can be prioritised, funded and authorised. This brief (the "**Project Brief**") will provide the basis for the Cooperation Fund Management Board to approve and launch the Project, and subsequently as the basis for the Project Manager to deliver the results expected.

1.1.2. Background

The Common Gateway for Applications (CG) is one of the projects of the Cooperation Fund. The OHIM Cooperation Fund ("**CF**") was established in February 2010 to support further harmonization in trade marks ("**TMs**") and designs, modernise national offices and enhance user experience Europe-wide.

The CF Management Board received numerous project suggestions from national offices and user associations. These were carefully examined and used as the basis for establishing a list of 23 projects. These projects are one-off activities delivering clear benefits, with concrete outputs and clear start and end dates.

Suggestions were called under four headings or fields:

- Harmonization projects: including existing projects such as TMview and new projects like Designview, a common examiner support tool and a common tool for the classification of goods and services;

- A suggested list of software packages (e-filing, e-opposition, e-cancellation, e-renewal and e-payment) to support national offices in providing easier access to trade mark and design protection;

- Information services comprising communication and training initiatives to help companies better understand the Community Trade Mark (CTM) and the Registered Community Design (RCD) systems;

- Activities to facilitate the enforcement of trade mark and design rights, helping the work of judges, customs and other relevant authorities.

Following the 18 May 2010, the CF Management Board issued the following mandate to the Project Manager:

Common Gateway for Applications	
Programme ID:	CF1.2.11
Expected start:	2 Q 2011
Timeline	2011 - 2013
Principles	Facilitating access to harmonised tools
Description	This project aims to create a common Gateway for all applications already existing or planned under the CF (e.g. e-filing, TMView, Euroclass), in order to facilitate user and national office access and maximise benefits

1.2. The Challenge

From the very beginning of the Fund it has been clear that at some point there would be a need to provide an easy and efficient way to access the software developed under the Fund. This will contribute substantially to the Fund's goals.

Our challenge is to build a Single Window in order to:

- Satisfy the Participant Offices (POs) needs in accessing their data and configuration schemes, as well as the administration tools provided with CF software

- Enable Users to easily find and make use of all the consultation tools, and locate the best source of information for TMs and Designs.

1.3. Objectives of the Project

1.3.1.   Project objectives in relation to the CF goals

The main objective is to build a Gateway to the European network for Trade Marks and Designs. This will be a single, state of the art, high performance platform, which offers all relevant online services for the TM and Design users in an easily accessible way.

This Gateway will be horizontal, providing an essential access point to the European network for Trademarks and Designs[1] covering many areas.

Online services which can be offered are:

- Integration of content provided by other sources:

  - Access to Common Search Tools

  - Access to knowledge bases

  - Entrance to eLearning Programmes

- Centralized restricted access to the POs grouping Administration tools related to the Cooperation Fund projects, e.g. Common Examiner Support Tool customization of services, business rules and traffic lights.

- Dissemination of information

  - News from the NOs or UAs related to the Trade Marks and Registered Designs field

  - Promotion for Seminars

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[1] The European Patent Network has its own portal to serve the Patent community: https://www.epn-cooperation.org/

- Common Label Management Tool to manage labels translations for the Gateway and for all those Common Applications which may require use of it.

- Platform ready for its extension in order to provide with personalized pages to the NOs and UAs if requested. These areas' content would be entirely the responsibility of the owner NO or UA.

- Alerts on selected items such as status on key services

- Web 2.0 collaborative services such as Blogs, Forums and entrance to the Cooperation Fund Wiki, in order to support other Cooperation Fund activity, as well as wider "convergence" initiatives among participating Offices.

- National Offices and Users Associations corner where to link with their respective websites bringing closer the new users to all official organisms dealing with their business' interest.

- Personalized services could be offered under the authenticated area, e.g. for Common Examiner Support Tool examiners could have access to the rendering of the results of the search report.

- Display graphical information wherever applicable in order to give visual impact; curve of usage of the systems, statistical data on visits and status of the systems could be some of the examples for this kind of presentation.

The Gateway would provide a meeting point, welcoming a large Community of users with similar interests.

The given project objective illustrates that the Common Gateway for Applications is fully aligned with the 3 Cooperation Fund goals.

CF goals	Project alignment	Comments
Modernising and streamlining National Office systems along common lines to provide effective and efficient services	Medium	Many of the applications developed under the Cooperation Fund count with an Administration Area. NOs and UAs webmasters will be able not only to centralize but also to personalize the use of these tools.
Encourage harmonization and use of EU TM systems and practices across the EU	High	Promotion of the use of the Common Tools and help POs in dealing in an efficient way with all administrative and configuration issues around them.
Assisting the competent authorities in the EU Member States to better promote and enforce trademark and design rights in their jurisdictions.	High	The Common Gateway intends to federate content from the POs and integrate both application and knowledge areas supporting decision making and enforcement processes.

1.3.2. Vision of the Project

Both a short-term vision and a long-term vision have been articulated for this Project. The short-term vision is focused on the construction of a platform to accommodate a variety of information, tools and applications through a single mechanism. It must also prepare the product to include the outcome of the long-term vision if applicable.

Long-term vision includes:

- **Single Sign-On** for authenticated areas or applications. Single Sign-On is a property of access control to multiple and not necessarily related software systems. In the short term vision a Single Sign On mechanism will be provided for the NOs and UAs users to log in once and gain access to all the administration tools and control panels from the Common CF tools. In the long term vision, this capacity can be re-used for any application that requires access control including the ones chosen by the POs in their private area if the wish to extend the Gateway.

- **Integration** by connecting functions and data from multiple systems into new components shown in a single view or workspace which facilitates knowledge access and decision-making processes.

- Stronger **personalization** of the Gateway. This could happen in two flavours; (a) the number of applications offered through the Gateway increases and it requires a deeper work on how to present the "me"-centered user experience of the resources: data, documents and people, (b) some POs want to extend the platform and create their own areas.

1.4. Expected benefits

Use of a Gateway brings additional exposure to its participants; all your potential public will be a few seconds away from knowing who you are and what you do.

<u>For end users</u>:

- Enhanced user-experience: By developing a consistent user interface (UI), constituting a sole point of access (one-stop-shop) to a wide variety of tools. Users will save time and effort in finding relevant services and IP related information. As a result, users will more easily be able to take informed decisions in the registration of TMs and Designs and subsequent processes.

- Continuous knowledge transfer: The Common Gateway for Applications will enable users to easily access news and updates or other relevant IP related information, both on a national and international level, including:

    - News on Seminars and Events;

    - News on changes to Policy or Legislation;

    - Updates on systems availability through alerts.

In addition, the Common Gateway will – through collaboration functionalities – allow users to continuously interact, ask questions or exchange information with National Offices or other users. An example might be examiners from different offices sharing ideas.

<u>For National Offices and User Associations</u>

- Efficiency enhancement for internal processes: The Common Gateway for Applications will offer a framework including a portfolio of new tools which will help office webmasters to manage their data, applications and information more easily through personalised views convenient and efficiently.

- Cost Savings: Administration area ready to be used: National Offices will be able to use the Gateway as a centralised desktop for administration through which they can access all their data and configuration schemes. As CF applications will, in a standard version, be integrated in the Gateway, National Offices and User Associations will as such not need to integrate such CF applications in their national systems or create a new administration area to be able to access such applications.

- The Single Sign On feature will reduce password fatigue and time invested in introducing different name and password combinations for each of the CF applications.

- Promotion of Offices/Associations by creating a European IP corner: By implementing and using the Common Gateway for Applications, entities will have the opportunity to:

  – Include a personalised link to their office's website;

  – Regularly push news or updates from their office or their national policies and legislation to the Gateway.

  – Offer a Gateway in their official language, including data and information in their official language;

- Availability of an extendable standard Gateway structure: The Common Gateway for Applications will be built based on a common architecture standard and with unified user interface, which can also be used or extended by National Offices to create personal portal areas or web-pages.

- Continuous knowledge and information transfer. The Gateway will, both on a national and international level, exchange, collect and reflect information which could be useful or relevant to offices or their staff, including:

  – News on Seminars and Events;

  – News on Policy or Legislation changes;

  – Updates on systems availability through alerts.

- Continuous training facilities: The Gateway will provide access to common e-Learning, as well as on a wide variety of IP related topics, providing POs and their staff with easy means to continuously improve their training and technical skills.

2. Project plan

The project plan establishes the preliminary basis for managing the Project, including the project approach, the project team and stakeholders, the work description, the deliverables, planning (tools), time and cost estimates and tolerances, the project risks and dependencies as well as reporting, quality, communications and close-out management strategies.

2.1. Project approach

2.1.1.   Overall approach

The overall approach for the Project contains 5 main phases, as reflected in the below figure:

Figure 1 - Overall Approach

These 5 phases are further explained below. For some phases, alternatives have been identified including the related risks and benefits of each alternative.

▪   **Phase 1 – Requirements, Services and Standards**

The Gateway is part of an execution infrastructure which must be properly analysed and defined to ensure the correct functioning of the developments. These tasks should be tackled during this first phase in which Requirements will be gathered, standards will be agreed upon and services will be defined. This is a key stage which not only has high visibility but also holds a heavy responsibility in the success of the whole project.

Step 1:	Specification of Gateway Requirements
Step 2:	Information Architecture
Step 3:	Architecture Standards
Step 4:	Profiles and Provisioning of Users
Step 5:	Definition of services
Step 6:	Unified User Interface
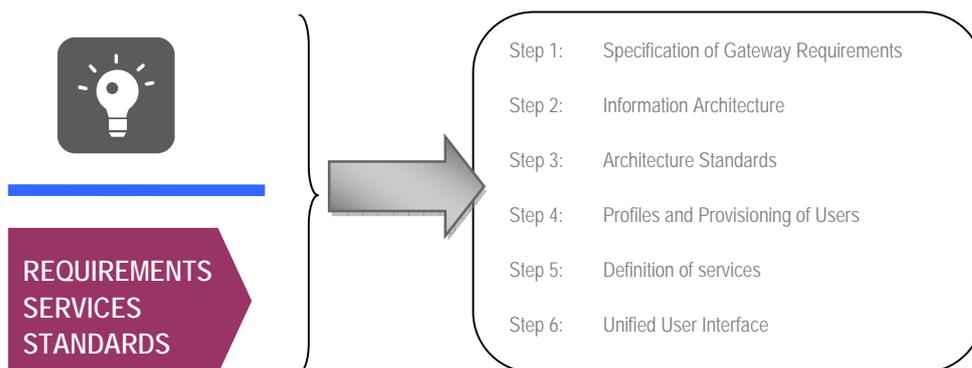
▪   **Step 1: Specification of Gateway Requirements**

The Project Team will gather the relevant technical requirements and formulate a proposal for the Working Group. Ambiguities and conflicts should be detected at this stage.

In specifying these requirements, joint working between the internal Project Team and the Participating Offices will be essential.

▪ **Step 2: Information Architecture**

This describes the structure of the system, i.e. the way information is grouped, the navigation methods, division between public and private areas and terminology used within the system. The work carried out during this activity will have an important impact in enabling users to step logically through a system confident they are getting closer to the information they require.

Following the gathering and approval of requirements, the information obtained will be categorized into a coherent structure.

▪ **Step 3: Architecture Standards**

This step aims to define the architecture standards, which form the blueprint of what is going to be built and how. The use of patterns and rules will allow the CF to provide consistency in how solutions are created, gather metrics to gauge the health of the development process and predict results applying some level of risk management.

A validation mechanism will be set-up between the Participating Offices so that standards can be added, removed or improved.

▪ **Step 4: Profiles and Provisioning of Users**

Once the Information Architecture has been defined, the different types of users involved within the Gateway platform should be identified, as well as their features, as permissions and correlations with other functionalities.

Project Managers of the CF applications to be included under the Platform will also be involved.

▪ **Step 5: Definition of Services**

Each of the target services will be assessed against the following attributes:

- Identification: User, provider and the system should have means of referring to the service in a meaningful way.

- Description: An explicit and detailed narrative definition supported by a detailed process model.

- Understandable: The NOs and UAs users must be able to understand what they can obtain from the service and it should follow by a clear statement of the limits to its use.

- Accessible: The potential user must be able to determine how to make use of the service. It must be clearly stated where, when and how the service is available.

- Relation: It should be possible to relate the service to other services and to other relevant resources.

▪ **Step 6: Unified User Interface**

Based on the information obtained under the previous step, the Unified User Interface can be developed.

This approach would be the ideal situation, as each step is highly dependent on the work performed and the deliverables of the respective previous step. Under this alternative approach, the Project start is accelerated by planning part of the work immediately after the approval of the Project

However, as most of these steps largely depend on the arrival of the External Provider resources, there is a risk that work cannot start immediately after the Project has been approved. There is indeed a risk that relevant work will only be performed shortly before or on the date of the Working Group Kick-Off Meeting.

The initial tasks related to both steps can be performed by internal resources, in collaboration with experts from Participating Offices, and later on handed over to the contracted external experts.

- Phase 2 – Prototype

Based on the requirements, services and standards defined under the first phase, the Prototype will be the working model to develop, test and rework as necessary to be finally agreed upon before going into development phase.

The Prototype should be approved by all the POs. The set of features to be included will be discussed by the Working Group before it is launched.

- Phase 3 – Development and Quality

Once an agreement has been reached on the Prototype, the final project deliverable can be developed and submitted to continuous and thorough quality testing.

The development phase will be further broken down into work packages (WP) which can be assigned to a party with specific related skills. Each WP will have defined start and end dates as well as allocated resources.

Dependencies - temporal or functional relationship between two or more work packages, are of particular importance during this phase. Once dependencies are identified there should be room for exploring options for concurrent work without impacting in the quality of the final product.

In due course the product will be submitted to the Software Quality Control (SQC) team for Quality testing including, but not limited to functional tests, security, code quality and performance. The SQC team will be responsible for ensuring that the product delivered meets the quality goals defined and assessing it against the original specifications.

- Phase 4 – Deployment

After the final Project deliverable is validated through a series of quality checks, the Product can be rolled out into the Production environment for normal use.

- Phase 5 – Close-out Strategy

Once the main deliverables have been completed and maintainability requirements identified, the Project Manager will present the Project's results to the Management Board, which will identify main lessons learned at the Programme level and close out the Project.

This project will not fund ongoing maintenance costs. A maintenance plan defining the future strategy and service level agreements will be developed before the project comes to its end.

2.1.2. Project scope and exclusions

The following [tasks / activities] are:

- **In scope:**

  – Gateway rolled out, up and running according to the defined and agreed specifications which functionally include the administration area for all the CF delivered applications.
  – Scalable Single Sign On solution (ready for future growths)
  – Technical possibility to aggregate services from NOs and UAs
  – Translation to the official languages of the POs plus English
  – High availability (24x7)
  – Compatibility with the most used browsers
  – Interoperability to the extent possible with NO/UA platforms, EPO and WIPO. This cannot include single sign on, but must include connectivity

- **Out of scope:**

  – Maintenance
  – Integration of NOs and UAs particular databases in the Single Sign On solution
  – Aggregation of NOs and UAs individual services

2.1.3. Constraints

The Project will be facing a number of constraints, as detailed below:

- **Time restrictions**: The project must be completed no later than 1 October 2015. Due to project dependencies, there is a clear need to start the analysis phase as soon as possible.

- **Resources restrictions**: Substantial OHIM internal resources will be required as well as a strong collaboration from the NOs and UAs being part of the Working Group.

- **Outcome**: In terms of the final user experience, the final product will be competing on the Internet against many other sites and early portals. Although some of these show information related to TMs and RCDs they are not consistently updated or have serious gaps in information.

2.2. Project team and stakeholders organisation

In order to carry out these activities, intensive interaction and coordination with the national offices and user associations is needed to gather different ideas, approaches, experiences, requirements, constraints and preferences.

Besides the intensive participation of the national offices (in short "**NOs**") and user associations (in short "**UAs**"), the Project will also involve the participation of a Project Manager, the CF Programme Manager, the CF Project Support Office (PSO) and other stakeholders (See ANNEX 2 – Project team overview (internal and external).

2.2.1.   Roles and responsibilities

The 3 tables below summarise the **key roles** involved in the Project as well as their main responsibilities within OHIM, the Cooperation Fund and the external provider/s, which will be contracted for the performance of certain tasks and activities under this Project.

Roles	Responsibilities
Project Manager (PM)	The PM revises the management of the lifecycle of the Project and the quality of its products delivered within the specified constraints of time and cost. The PM revises plans, monitors and reports on the Project and reports to the Programme Manager. The PM is authorised to lead the Project on day-to-day basis on behalf of the CF Management Board within the constraints laid down by the Board. The PM acts as a central point of communication. The PM is responsible for presenting the Project at the gate review process.
Working Group Members	National Office or User Association IP experts are responsible for the requirements of the product to cover the needs of his National Office or User Association. In addition the National Office or User Association IP expert is responsible for: ▪ Documentation or specific input needed for the requirements gathering phase. ▪ Providing information and data source if applicable for the authenticated users related to them. ▪ Contributing in the creation of an exhaustive list of services and/or links of interest in the TMs and Design IP area. ▪ Throughout the project with their feedback. ▪ Participation in tests.
CF Programme Support Office	The PSO supports the Programme Manager and Project Managers. It aids those involved in the Project by provision of technical and administrative capacity, and quality assurance.
OHIM Business Lead	The OHIM Business Lead will provide general support and knowledge on business needs and communications aspects at the initial stages of the Project. In addition he/she will be responsible for: ▪ Helping in the validation of the requirements ▪ Organizing a usability study
OHIM Technical Lead	The OHIM Technical Lead is responsible for assisting the Project Manager in providing any technical clarifications. The OHIM Technical Lead is the bridge between the business requirements and the technical requirements, and is responsible for identifying any interdependency.
SQC Coordinator	The OHIM SQC Coordinator is responsible for coordinating the Software Quality Control of the Project.
CF Architecture Team	The CF Architecture team is responsible for assisting the OHIM Technical Lead and Project Manager in

Roles	Responsibilities
	providing guidelines and expertise on the final solution.
Installation Expert	The Installation Expert is responsible for the coordination with the Installation service of the OHIM which holds the responsibility for installations and infrastructure.
PMO Coordinator	The PMO Coordinator is responsible for the quality assurance at project management level.

Table 1 - Roles and responsibilities within OHIM

Apart from the main roles in the Project, there will also be **other parties and stakeholders** involved in the Project:

Roles	Responsibilities
CF Programme Steering Group	Ensuring that all internal OHIM issues are addressed by the Programme Manager.
CF Programme Manager	The Programme Manager is responsible to the CF Steering Group for the operations of the CF, overall planning, and leading the development and implementation of the Project portfolio.
CF Programme Tender Review Group	Supporting the OHIM procurement team, they will assure that tendering procedures across the CF are carried out efficiently, consistently and in accordance with best practice.
CF Programme Risk Management Group	Established to: ▪ recognise possible risk factors and identify related risks ▪ assess the potential impact of these risks on the programme ▪ select the adequate risk response and implement action plans ▪ monitor the status of the risks and keep stakeholders informed They will be in close contact with the Project Manager and the PSO in order to identify and register any new risk that could arise along the duration of the Project.

Table 2 - Roles and responsibilities within the Cooperation Fund

Project tasks and activities will be outsourced to an external provider, which will need to provide the following **external resources** for the Project:

Roles	Responsibilities
Communications expert	The project will be successful only if it is used, and this implies broad use of communications media and presentation. The Project manager will decide upon the best approach together with the CF Communications Group.
Project Assistant	Support all aspects of project delivery along the project life cycle. Administrative tasks related to the coordination of the project work and the POs. Excellent English Thorough knowledge in MS Office Tools
Usability expert	The Usability expert is responsible for analysing the usability trends, document and propose an approach as well as performing the necessary tests in terms of usability of the product to be developed. The Project manager will judge during the implementation of the project whether it is preferable to seek a specific expert or buy a service from an appropriate provider.
Graphical designer	Responsible for contributing and applying common Look & Feel.
IS Senior Consultant	Analysis of business processes, user requirements, functional requirements and technical requirements of a software project. Design of sound technical solutions for new information systems or for adaptations for existing information systems Data analysis and modelling.
Senior Software Developer	Design and implement high quality software solutions to fulfil the specifications based on the requirements Perform unit, integration and factory acceptance testing and assist software quality control, do site acceptance testing, including user acceptance testing. Optimise all elements of a software solution: databases, applications, interfaces, etc. Thorough knowledge of the architecture involved. Produce the relevant technical or user documentation for a system.
Software Developer	Write and maintain software that corresponds to the specifications based on the requirements Perform unit, integration and factory acceptance testing and assist software quality control, do site acceptance testing, including user acceptance testing. Optimise all elements of a software solution: databases, applications, interfaces, etc. Produce the relevant technical or user documentation for a system.
IS Architect	Thorough knowledge in designing and installation of High Availability solutions for both web servers and

	databases. Experience in installations on Virtual Machines, cloud computing, ESB, Active Directory, Single Sign On solutions. Quick response in troubleshooting during installation
SQC Team	The SQC team is responsible for the functional and technical testing to be done before the User Acceptance Tests (UAT): ■ Support for the definition of test strategy and acceptance criteria. ■ Installation in test environment ■ Functional, Stress, Performance, Security and Code quality testing The SQC team will also give support during the UAT. When the application will be accepted, the SQC team will coordinate the installation in production.
Installation Deployment Team	The Installation Deployment Team is responsible for the Release in Production and further technical maintenance of the delivered product.

Table 3 - Roles and responsibilities within the external provider

Besides the roles defined above, there is a legal need for official translations. The project includes in its scope (*see paragraph 2.1.2 Project scope and exclusions*) the translation into the official languages of all 24 official languages, including 22 plus Croatian and Irish. This piece of work will be executed by the Translation Centre for the Bodies of the European Union (CdT) who will, in the first instance, validate the texts: labels, messages, help files, etc. in English, taking special care of the context in which they are used. This formal correction in English should ensure the right translation to all the official languages of the EU[2].

2.2.2. Assignments and commitment during the Project

Based on the information available, the expected commitment (in man days) during this Project's lifetime for each of the aforementioned roles is as follows:

Role	Who	Commitment in man days
Project Manager	Sonia Pérez Díez	195 days
Programme Support Office	PSO Team	21 days
Project Assistant	External provider	84 days
Project Team	Nicolas Vigneron Alexandre Tran Technical Lead	95 days
SQC Coordinator	Xavier Xheneumont and/or assistant	14 days
SQC Team	External Provider	82 days
Installation Expert	Eamonn Kelly and/or assistant	16 days
Installation Deployment Team	External Provider	10 days
Procurement Expert	Lilian Fraysse	5 days
Working Group	7 working Group members	273 days (39 days per member)

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[2] Budget is included for Croat and Irish Gaelic to enable decisions to be taken at the appropriate time. This is more cost effective than a separate exercise.

Role	Who	Commitment in man days
Development Team	External Provider	555 days
IS Senior Consultant	External Provider	55 days
Architecture Solution	External Provider	50 days
Design and Usability Team	External Provider	55 days or service
Communication Expert	External Provider	40 days or service

Table 4 - Role Assignments and Commitment per role (in man days)

2.2.3. Recruitment

Recruitment of additional resources will be required on the following levels:

- **National Offices and User Associations**

Experts from National Offices and User Associations will be selected among those interested in participating, based on objective selection criteria .The profiles required are staff from NOs and UAs who show an interest in this project and either have knowledge on the technical area related to Portals or websites or otherwise, have experience in work related to external relationships with clients and end users.

It needs to be underlined that the National Offices that will implement the Project (herein referred to as "**Participating Offices**" or in short "**POs**") should realise that the Project might have an end on the IT aspect of it, but the maintenance of the Product is a never-ending task. Therefore these offices should also foresee resources that should work on administering the tool or product to be delivered under this Project, also after it goes live.

- **External provider**

Different profiles of external experts will be required for this Project, including: Project Assistant, Functional Analyst, IS Architect, IS Senior Consultant, IS Consultant, Usability Expert, Graphical Designer, Senior SW Developer and SW Developer, as well as communications expertise. These profiles' descriptions were included under Table 3 - Roles and responsibilities within OHIM. The idea is to build a cooperative and proactive team out of the staffing selection which will be driven by the description of the tasks linked to the profiles involved. In all cases, if the Project Manager judges it preferable to purchase a service from an appropriate provider, he/she will make an appropriate recommendation.

Recruitment will be carried out in conjunction with the PSO, according to the process agreed internally. Regarding the Quality Assurance Team and Installation Team it is expected that the OHIM framework contracts will give support to the effort involved.

2.3. Work description

Under this chapter the work to be done under the Project is first broken down into high-level tasks and activities, followed by an overview of the main Project Deliverables and acceptance criteria.

2.3.1. Tasks and activities

A preliminary overview of the tasks and activities follows below, together with a short description of each task or activity and followed by a table indicating the Project roles to be involved and the estimated man days per profile.

- **Working Group creation**: In this phase, stakeholders will be contacted and invited to participate. The project terms and participation conditions will be explained to POs and their initial commitment will be obtained. The team, the methodology, roles and responsibilities will be defined and agreed.

- **Kick off meeting**: This initial meeting enables the project approach to be explained in detail including time plan, tasks, resources, communication strategies, deadlines and other possible constraints, as well as the formal presentation of the roles involved and the individuals taking them over.

- **Resource Allocation**: CV screening, interviews and recruitment of those individuals best fitting the roles defined in section 2.2.1 Table 3 - Roles and responsibilities within the external provider.

- **Analysis**: In this phase the requirements – business and technical – are specified through an incremental and iterative process involving all team members. This activity can be further detailed in 5 subtasks:

  - **Information architecture**

    Expressing a model used in activities that require explicit details of complex systems. The Information Architecture Institute defines this area as the art and science of organizing and labelling web sites, intranets, online communities, and software to support navigation and ease of use. The Project will determine the relevance of each of the following areas, and the approach to betaken to their delivery:

    – Content Management System

    – Web development model

    – User interactions

    – Enterprise architecture - directly related with the next subtask: Architecture standards.

    – Division between public and private areas

  - **Architecture standards**

    The architecture team will play a critical role in providing a solution architecture that will be aligned to the ones developed in the Common Tools of the CF. It should also include some integration patterns for current or future services.

  - **Profiles and provisioning of users**

    – Identification of the different types of users involved within the platform and their features such as access rights, dependencies with other functionalities etc.

    – Deeper analysis of the different sources for the users.

- **Services**

  - Study on the collaboration Web2.0 services to offer. Web 2.0 refers to web applications that facilitate mainly participatory information sharing and collaboration on the web such as blogging, RSS, Forums, etc.

  - Evaluation of the alternatives according to the web status of the POs

- **Unified User Interface**

  - Involvement of an external company specialized in Look & Feel and usability. The outcome of this task will be directly applied during the Prototype phase.

- **Prototype**: The team will build a prototype which should be used as a model of what the Common Gateway should look like. The entire outcome from the Analysis phase must be taken into account as long as it is applicable to the prototype.

- **Development**: In this phase, the external provider develops the tool and periodically reports to the OHIM project manager. Also any exception is handled by the project manager.

- **Quality Control**: A series of quality checks: integration, code quality review, functional, security and performance are carried out in order to guarantee the correct behaviour of all the involved components. Validation of all deliverables: documents and software package.

- **Deployment**: Product roll out in Production environment.

- **Close-out strategy**: Once the project is successfully up and running in Production, some sort of commitment needs to be made by the POs to ensure the sustainability and continuance of the initiative. Services Level Agreements, release procedures, preventive/corrective/adaptive maintenance topics need to be tackled at this stage.

The above mentioned tasks and activities, as well as their planning, are further elaborated in the Project Plan under Chapter 2.5. This information will be the basis for the cost estimates calculated under Chapter 2.6.

2.3.2. Major Deliverables and acceptance criteria

The following list shows the expected major deliverables for this Project:

Deliverable	Acceptance Criteria	Responsibility	Estimated Date
User Requirements document	It would be signed-off by the WG and the Project manager	Project manager PO representatives POs workgroup	$T0^3$+ 18 weeks
Architecture Standards	It would be signed-off by the WG and the Project	Project manager + workgroup	T0+ 10 weeks

---

[3] T0 is set as the week of the Kick Off meeting.

Deliverable	Acceptance Criteria	Responsibility	Estimated Date
	Manager		
Definition of content structure	It would be signed-off by the WG and the Project manager	Project manager + workgroup	T0+ 22 weeks
Content	It would be signed-off by the WG and the Project manager	POs + Project manager + workgroup	T0+ 38 weeks
Usability study	It would be signed-off by the WG and the Project manager	Project manager + PO representatives POs workgroup	T0+ 27 weeks
Look & Feel guidelines	It would be signed-off by the WG and the Project manager	Project manager + workgroup	T0+ 27 weeks
Prototype	Signed-off by the WG and the Project manager	Project manager + workgroup	T0+ 28 weeks
Tool selection report	Signed-off by the WG and the Project manager	Project manager + workgroup	T0+ 24 weeks
Functional design	Signed-off by the WG and the Project manager	External contractor + Project Manager	T0+ 24 weeks
Technical design	Signed-off by the WG and the Project manager	External contractor + Project Manager	T0+ 26 weeks
Integration Contracts	Signed-off by the WG and the Project manager	External contractor + Project Manager + workgroup	T0+ 28 weeks
Database Model Design	Signed-off by the WG and the Project manager	External contractor + Project Manager	T0+ 28 weeks
Testing approach (it includes test plan)	Signed-off by the WG and the Project manager	External contractor + Project Manager	T0+ 40 weeks & T0+ 72 weeks
Administration Manual	Signed-off by the WG and the Project manager	External contractor + Project Manager	T0+ 40 weeks
User Help Manual	Signed-off by the WG and the Project manager	External contractor + Project Manager + Working group	T0+ 40 weeks

Deliverable	Acceptance Criteria	Responsibility	Estimated Date
English texts validated	Signed-off by the WG and the Project manager	External contractor + Project Manager + Working group	T0+ 40 weeks
POs official languages translation	Signed-off by the WG, POs participants and the Project manager	External contractor + Project Manager + Working group + POs participants	T0+ 55 weeks
Software application	Test plan results signed-off. Unsolved problems or bugs within the tolerance of the Project to be approved by the Project manager It would be signed-off by the WG and the Project manager	Project Manager + Working group	T0+ 68 weeks
Service Level Agreements	It would be signed-off by the WG and the Project manager	Project Manager + Working group	T0+ 74 weeks
Communication plan	It would be signed-off by the WG and the Project manager	External provider, Project Manager + Working group	T0+ 20 weeks
Satisfaction and statistics report	It would be signed-off by the WG and the Project manager	Project Manager + Working group	T0+ 76 weeks
Future maintenance plan	It would be signed-off by the WG and the Project manager	Project Manager + Working group	T0+ 76 weeks

2.4. Project planning tools

MS-Project and MS-Excel will be used as appropriate. As a minimum, the identified Project Tasks, Milestones and Resource estimations will be uploaded into Clarity, to ensure that at all times the Clarity tool includes the relevant Project information.

In general, Clarity will be used by the Project Manager for broader project management and reporting, including timesheets.

2.5. Project time plan

The total duration of the Project estimated to be completed is 15 months from T0 where T0 is set as the week when the Kick Off meeting takes place. A very significant part of this time is needed to ensure adequate consultation, discussion and acceptance from POs and the wider audience.

The following schedule is an extract of the Project Plan on a high level according to the approach presented under 2.1.1 Overall approach.

1.2.11 Common Gateway for Applications

Code	Description	2011									2012											
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	
P1	**Starting Up**																					
P1.1	Complete Project Brief																					
P1.2	Approval by PSO (Gate 1)																					
P1.3	Approval by CF MC (Gate 2)																					
P2	**Initiating**																					
P2.1	Setting Up Working Group																					
P2.2	Procurement																					
P2.3	Kick Off Meeting																					
P3	**Managing a Stage**																					
P3.1	Resource Allocation																					
P3.2	Analysis																					
P3.2.1	Requirements gathering																					
P3.2.2	Information architecture																					
P3.2.3	Architecture standards																					
P3.2.4	Profiles and provisioning of users																					
P3.2.5	Services																					
P3.2.6	Unified User Interface																					
P3.3	Usability + Look & Feel																					
P3.4	Prototype																					
P3.5	Development																					
P3.6	Quality Control																					
P3.7	Deployment																					
P4	**Closure**																					
P4.1	Closure Strategy																					

2.6. Project cost estimates

The overall revised estimated cost for this project over 15 months is EUR 721.915.

COST CATEGORY	PROJECT BRIEF APR / JUL 2011	PROJECT BRIEF OCT 2011
IT Project Costs	463.000	408.660
Non-IT Project Costs	231.745	255.003
Management Reserve	71.881	58.252
Grand Total	**766.626**	**721.915**

COST CATEGORY	PROJECT BRIEF APR / JUL 2011	PROJECT BRIEF OCT 2011
IT Project Costs	**463.000**	**408.660**
Development	**330.000**	**274.500**
2011	130.000	78.500
2012	200.000	196.000
Project Support	**42.000**	**20.160**
2011	18.000	2.880
2012	24.000	17.280
IT Services	**46.000**	**69.000**
2011		16.000
2012	46.000	53.000
Hardware & Software	**45.000**	**45.000**
2011	25.000	
2012	20.000	45.000
Non-IT Project Costs	**231.745**	**255.003**
Meetings	**27.118**	**25.333**
2011	7.938	7.938
2012	19.180	17.395
Studies & Consulting	**66.500**	**80.500**
2011	28.000	21.000
2012	38.500	59.500
Translation	**66.960**	**66.960**
2012	66.960	66.960
Working Group	**71.167**	**82.210**
2011	51.167	29.710
2012	20.000	52.500
Management Reserve	**71.881**	**58.252**
Grand Total	**766.626**	**721.915**

IT Project Costs

Development EUR 290.000

2011
IS Consultant and IS Senior Consultant combined in 1 role 55 days EUR 27.500.
IS Architect 50 days EUR 25.000.
Senior Software Developer 40 days EUR 16.000.

2012
Software Developer and Senior Software Developer 515 days EUR 206.000.

IT Services EUR 69.000

- Software Quality Control (more or less 25% of Development Effort) 160 days EUR 64.000.

- Installation Team (Deployment) 10 days EUR 5.000.

Project Support EUR 20.160

- 2011 : 12 days
- 2012 : 72 days

Hardware EUR 25.000

A total of EUR 20.000 has been considered for two possible servers and EUR 5.000 for disk space or other minor purchasing required.

Software EUR 20.000

Non-IT Project Costs

Studies & Consulting EUR 66.500

2011
Graphical Designer 10 days EUR 7.000

2012
Business Analyst Communication 40 days EUR 28.000
Graphical Designer 25 days EUR 17.500
Usability Expert 20 days EUR 14.000

Working Group EUR 82.210

7 participants were selected for the Gateway Working Group (6 NOs and 1 UA).

Participants from the same NO share the maximum number of working days.

For budgeting purposes, the Working Group effort is estimated at a daily rate of 500 EUR.

Effective daily rates and maximum number of working days per participant are outlined in the CF Agreements with each NO and project budget is adjusted accordingly.

Original budget 39 days
2011: 31 days * 5 NO participants = EUR 51.167,36
2012:   8 days * 5 NO participants = EUR 20.000

Revised budget 39 days. Correction in repartition of days per year.
2011: 18 days * 5 NO participants = EUR 29.710,08
2012: 21 days * 5 NO participants = EUR 52.500 (for estimation purposes, amount to cover the actual rates of 6 NO participants)

Meetings EUR 25.333

In line with Decision of the President ADM – 09-33 rev 2, travel reimbursement costs have been estimated as follows:
-    Travel EUR 700
-    Accommodation flat rate EUR 125 / night
-    Allowance EUR 92 EUR for full day, EUR 46 for half-day (when travelling to and from meeting destination)

Estimated cost for a 2-day meeting 1.351 EUR per participant.
Estimated cost for a 1-day meeting 1.134 EUR per participant.

Working Group Meetings
Gateway Working Group 7 participants.
2011 : 1 * 1-day meeting * 7 participants = EUR   7.938
2012 : 1 * 2-day meeting * 7 participants = EUR   9.475 (follow up meeting)
2012 : 1 * 1-day meeting * 7 participants = EUR   7.938 (closure meeting)

Translation EUR 66.960

2012 : 30 pages * (22 + 2 new languages) * 93 EUR per page (CDT cost in 2011)

Management Reserve

10% for cost from 2012 onwards = EUR 58.252.

2.7. Risk analysis

This preliminary risk matrix is specific to the Project and lists possible areas of risks. It is complementary to the "Cooperation Fund Programme Risk Matrix":

In the following table:

a. P is the **probability** of the risk occurring, rated: 1 (low), 2 (medium) or 3 (high).

b. I is the **impact** of the risk on the project, rated: 1 (low), 2 (medium) or 3 (high).

c. P*I product measures **how a given risk can affect the project**, rated according to the table below:

P I	1 (Low)	2 (Medium)	3 (High)
1 (Low)	1	2	3
2 (Medium)	2	4	6
3 (High)	3	6	9

Risk	Risk Symptoms	Area	P	I	P*I	Owner	Action
Insufficient Intent to implement by National Offices	Lack of interest by National Offices in request to help specify the Project.	Sponsorship	H	H	9	Project Manager	**Mitigate** Reinforce to the NOs the added value of a Gateway in administering the CF applications as well as the promotion of information dissemination tools.
Time and budget creeps	Delay in staffing process and probability of needing extra resources to reinforce the team in order to finish in time	Funding	M	M	4	Project Manager	**Mitigate** Reduce scope or carefully increase budget to engage more resources to keep project in time and budget tolerances
Poor added-value of the final deliverable	Architecture / Standards are not available yet, while the applications to be included are already under development.	Interdependencies	M	H	6	Project Manager	**Mitigate** Take alternative 2 of Project Approach in order to produce standards at earlier stage.

Risk	Risk Symptoms	Area	P	I	P*I	Owner	Action
Difficulty to select external expertise	As lessons learned from other projects it has been very difficult to find the level of required expertise in certain IT tools.	Resource availability	H	H	9	Project Manager	**Mitigate** OHIM website Team performing key tasks to ensure minimum core functionality.
Project deliverables do not fit together due to the absence of information	set up a collaboration mechanism between the Project Team and other Project Managers / Teams from the CF ongoing projects.	Interdependencies	L	L	2	Project Manager	**Mitigate**

Table 5 - Project Risk Register

2.8. Key dependencies

A number of key dependencies can be identified with other projects under the Cooperation Fund or OHIM in general, i.e.:

CF Projects

It is foreseen that all those CF projects which provide search services for the general public should be integrated and administered from the Common Gateway for Applications. This project has been formally approved and close coordination with the other projects will kick off in order to align and harmonize all the boundaries to be found.

CF projects likely to be included at the present time: CF128 Design View, CF127 User Satisfaction Survey, CF1210 CESTO, CF113 EuroClass, CF214 FSP, CF111 Search Image, CF112 TM View, CF129 Similarity of Goods & Services, and CF320 eLearning CF422 Enforcement Database, CF423 Enforcement Standard.

2.9. Project plan and schedule reporting procedure

As set out in the Programme Operating Rules agreed by all internal parties involved in the CF:

- The Project Manager will report to the PSO.
- Project managers create, maintain and update the following minimal documents for their projects:
    - A **risk register** and, if appropriate, the suggested contingency plans.
    - **Project plan** and **schedule** (including breakdown tasks, costs, time and resources). It will include tracking information (actual and planned) in a visual manner.
    - A **stakeholder engagement and communications plan**.
- The documents will be reported upon using a standard template (according to Programme Operating Rules)

- The documents shall be kept as light as possible but the PM retains the authority to define their content and set the reporting schedule. Initially a meeting with the PSO will be set up on a fortnightly basis.
- Project Managers are responsible for preparing the content for a Gate Review. PSO will support them in the process.

As well as the Project Manager-PSO interactions, the PSO will also hold independent **6-weekly meetings** with the Risk Group and, **when deemed necessary**, with the Tender Review Group respectively. In each meeting the PSO will report on the status of the Project and will bring up any topic under their fieldwork that needs either further discussion or their validation.

Task	Recurrence	Assigned role	Responsibilities
Regular reporting	Monthly; updates **weekly** via Clarity tool	Project Lead	Monthly reporting to the PSO: Project plan, risk register and communications plan
Gate review management	Undefined	Project Manager / Project lead	Documentation for the Gate Review process
Reporting to Risk Group	Every 6 weeks	PSO	Update on the latest status and issues to discuss
Reporting to Tender Review Group	Regularly, in the event of a tender-related issue	PSO	Update on the latest status and issues to discuss
Reporting to Programme Steering Group	Monthly	Programme Manager	Update on the latest status and issues to discuss

Table 6 - **Reporting Task and Responsibility Matrix**

2.10. Quality Management and quality expectations

The Common Gateway for Applications will always be available on the Internet for any interested party. This means the application should be of high quality and strictly compliant to the requirements. This should be especially the case with the requirements for the anonymous user /administrator interface as usability tests will be done exactly in order to make sure it is made user friendly.

The collaborative, peer-review nature of this part of the Project makes the achievement of quality relatively straightforward; use of wiki-based tools enables errors to be quickly detected by other users, and corrections made by one to be seen by all. Verification of quality is carried out by periodic requests for review to the NOs, and ultimately by the validation process at Participating Offices.

2.10.1.   Quality Activities in the development lifecycle

The quality activities of the development of the software will follow a standard approach by a specialized contractor, independent of the contractor employed to implement the software. The overall process is illustrated here:
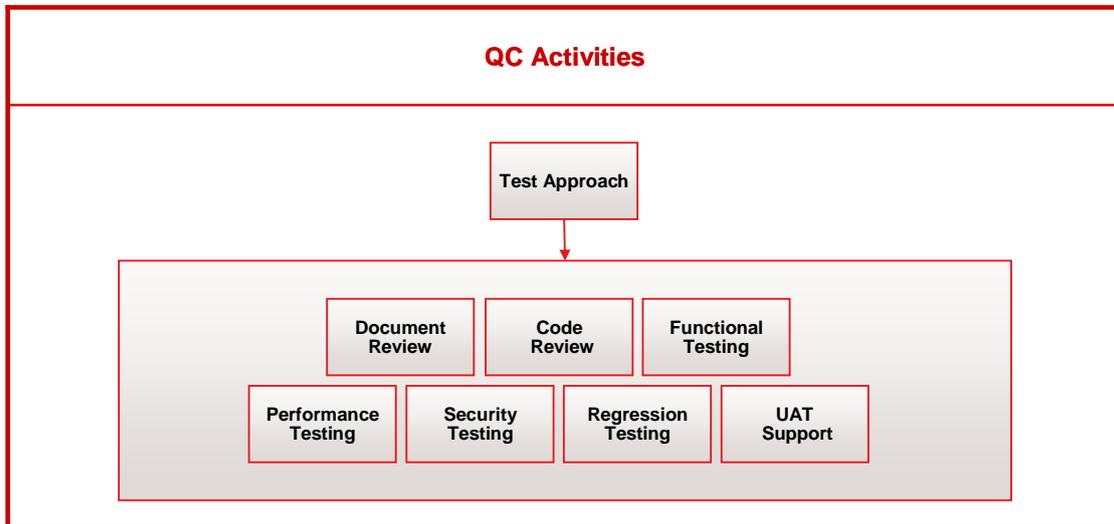
The basic test approach is defined at the beginning of the Project and it consists of the production of a software test approach, where the specific scope of the software quality control activities will be defined. For the definition of this scope, stakeholders are consulted and ultimately, the Project Manager will receive a "Test Approach Document" specific for the Project.

The following activities will always be present in every Project, and executed by the specialised contractor:

- Document review of the requirements in order to establish <u>acceptance criteria</u> before starting the implementation phase.

- Elaboration of a test plan and test design

- Validation of key Project documents: The purpose of the document verification for an application is early detection of errors in documentation, in order to increase the quality of the product in the next phases of development.

- Check of continuous build and automatic deployment

- Static and Dynamic testing

- Use of incidents tracking tool

- Code review: The aim of the code review is to determine the quality of the software developed, and to compare the quality between different applications.

- Stress and performance analysis: The aim of performance testing is to verify that the applications going to production operate according to their defined response times, and are able to handle the load they are required to handle.

- Security testing: The aim of security testing is to verify that the applications going to production operate according to its security requirements and to any security standards set for the software.

The following are also needed, but may be carried out by users instead of a specialised team

- **UAT support**

    The objective of UAT support is to provide technical and functional support to acceptance testing.

- **Functional testing**

    The aim of functional testing is to verify that the applications going to Production operate according to its functional requirements.

In order to improve the transparency, the specialized software quality control provider will report findings both to the Project Manager and OHIM's Head of Quality Assurance Sector in the IT Department.

2.11. Communications and knowledge management

2.11.1. National office interactions

The communication and interactions between the Project members and the national offices will take place through:

- **Periodic conferences** (telephone, video, in person, etc.) are expected between all involved Project members. Regular Project updates will be sent to Working Group members and other offices with intent to implement the Project.
- **Continuous contacts** by the use of various tools described in the chapter below.

2.11.2. Tools

Apart from using general **e-mail** for official communications, **collaborative tools** have proven very successful in past OHIM projects involving significant coordination of effort among Participating Offices. A quick assessment of the available and most widely extended collaborative tools in the market (e.g. Google Docs, wiki software…) reveals Cooperation Fund Wiki to be among the most powerful and appropriate tools for this type of Project. Cooperation FundWiki's simplicity, web-based operation and free-of-charge approach, allows participants in different locations to easily exchange ideas in an organised and efficient way.

To sum up, different types of tools will be used during the Project, namely:

- **E-mail**: will be used in initial communications during the Project and in formal communications to keep all the national offices updated (even if they do not actively participate), and in reporting to the Cooperation Fund PSO.

- **Clarity**: will be used as an internal project management and reporting tool, including all relevant Project information like tasks, activities, milestones, risks and issues as well as time and cost estimates and actuals.

This information will also be used to baseline and check the Project's status and track any progress made. Internal participants will also be asked to submit timesheets through Clarity.

- **Cooperation FundWiki**: once the Project has been launched, all the participants involved in the Project should, as far as possible, keep all the communications and documentation inside a wiki. To the extent possible this must be ShareIPwiki. This will help to maintain all the information related to the Project stored in a unique and central repository and fully accessible by every participant in the Project

- **Skype**: will be used throughout the whole Project as an easy tool to hold telephone conferences with different parties in different locations without having the need of a heavy infrastructure.

- **Videoconference:** will be used throughout the whole Project as an easy tool to hold conferences with different parties whenever it is needed or beneficiary to have a close contact, as if all participants were physically present in the same room.

2.12. Closing-out strategy

Once the main deliverables have been completed and accepted, all relevant payments made, and the sustainability requirements identified, the Project Manager will present the Project's results to the Management Board, which will identify main lessons learned at the programme level, direct the Programme Manager accordingly and close out the Project.

The deliverables in this project will leave a legacy for the participating offices. The information created can be grouped into two areas: common areas where supporting the public and authenticated access for the POs and the private areas – if created by extension of the Common Gateway – of the POs.

3. ANNEXES

3.1. ANNEX 1 - Definitions, Acronyms and Abbreviations Table

Definition / Acronym / Abbreviation	Description
CdT	Translation Centre for the Bodies of the European Union is the official European Commission centre to provide the translations services required by the specialised decentralised agencies of the European Union.
CF	Cooperation Fund
NO	National Office
PO	Participating Offices, referring to National Offices and User Associations having confirmed their participation in the Project, whether for merely assisting in the specification of the Project or the later implementation of the Project's final deliverable.
PSO	Project Support Office
RCD	Registered Community Designs
SAT	Site Acceptance Test
SLA	Service Level Agreement
SQC	Software Quality Control is the team in charge of checking that the software delivered complies with the project specifications and applicable quality standards.
TM	Trade Mark
UA	User Association

UAT	User Acceptance Test
WG	Working Group
WP	Work Package: Unit of work which has got its start and end date and can be assigned to a specific party for execution.

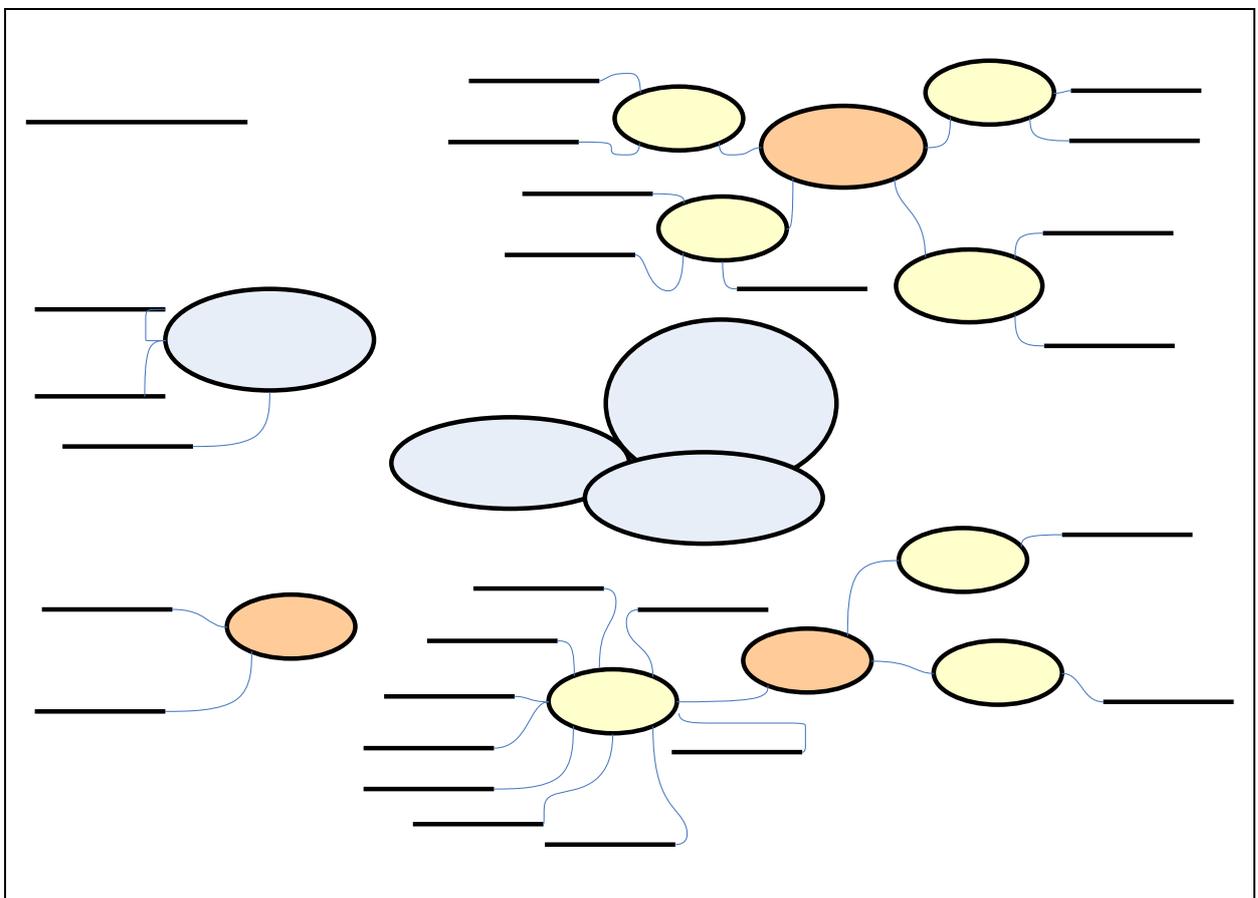## 3.2. ANNEX 2 – Project team overview (internal and external)

Figure 2 - Project Team

3.3. ANNEX 3 – Profiles Description

- **A. National Offices and User Associations**

- Ability to speak, write and read fluently in English

- Excellent communicator at all levels

- Project management, Team Leader or equivalent skills and experience in the IT field.

- Relevant experience with Portals and/or web pages and/or Intranets and/or Extranets

IS Senior Consultant

Nature of the tasks

- Provision of advice and assistance in any area associated with the provision, delivery, maintenance, deployment, hosting, effective use of information systems and their environments.

- Provision of security technical consultancy, security assessments or other security matters associated with information system projects

- Provision of technical consultancy, technical expertise, technical evaluations in relation with information systems

Knowledge and skills

- In depth knowledge of information systems matters

- In depth knowledge in IT consulting matters

- Strong capacity in preparing and writing technical consultancy

- Strong capacity to give high level presentations

- Ability to apply high quality standards

- Ability to participate in multi-lingual meetings, excellent communicator

Education and experience

- Minimum 10 years of relevant technical consultancy and experience after secondary school

- Minimum 6 years of IT professional experience

- Strong experience in IT consulting

- Strong experience in the domain of the study

- Strong experience in the realization of technical consultancy

Optional specific expertise

- Minimum 3 years in the domain of the study or specific technologies chosen for the Portal development

IS Architect

Nature of the tasks

- Analysis of information systems portfolio

- Analysis of business processes

- Analysis of organisational structures

- IS costs/benefits analysis

- Development and enhancement of architecture

- Assistance with the implementation of the architecture

Knowledge and skills

- Proven knowledge of enterprise architecture

- Strong capacity in writing and presenting technical consultancy

- Ability to participate in multi-lingual meetings, excellent communicator

Education and experience

- Minimum 9 years of relevant technical consultancy

- Minimum 6 years of IT professional experience

- Experience in consulting

- Experience in enterprise architecture models and tools

- Proven experience with quality procedures

- Strong experience in the realization of technical consultancy

Optional specific expertise

- Minimum 3 years with requested enterprise architecture tools, software models or business process analysis tools

Project Assistant

Nature of the tasks

- Produce project documentation (e.g. quality plan, monthly highlight reports)

- Participate in functional working groups and progress meetings

- Provide Ad hoc analysis and reports for senior management

- Supporting Risks and Issues management

- Provide administrative support to the project as required

Knowledge and skills

- Good knowledge of project management standards and methodologies

- Usage of project management tools. Willingness to use the project management tool as specified by the OHIM

- Good reporting methods

- Ability to give presentations

- Ability to apply high quality standards to all tasks

- Ability to participate in multi-lingual meetings, good communication skills

- Capability of working in an international/multicultural environment, rapid self-starting capability and experience in team working, understanding the needs, objectives and constraints of those in other disciplines and functions

Education and experience

- Minimum 2 years of relevant experience after secondary school

- Minimum 1 year of IT professional experience

Optional specific expertise

- PRINCE2 Foundation qualification

Senior Software Developer

Nature of the tasks

- Consultancy studies on specific technical matters regarding information systems and IT processes.

- Preparation and validation of quality plans for building and maintaining information systems.

- Analysis of business processes, user requirements, functional requirements and technical requirements of a software project.

- Design of sound technical solutions for new information systems or for adaptations for existing information systems

- Data analysis and modelling

- Cost / benefit analysis in the area of information systems

- Participate in meetings with stakeholders: users, project board members, project managers, etc.

- Define practices and guidelines for development environment management

Knowledge and skills

- University Degree in a relevant subject

- Ability to participate in multi-lingual meetings, good communicator

- Capability of integration in an international/multi-cultural environment, rapid self-starting capability and experience in team work are mandatory

- Capability of applying formal quality standards in the IT environment

- Quality of IT projects

- High level of English

Education and experience

- Minimum 6 years in Software Development

- Minimum 4 years experience in the technologies and techniques relevant to the specific project or activity

Software Developer

Nature of the tasks

- Prototyping

- Write and maintain software that corresponds to the specifications based on the requirements

- Designing websites and navigation flows; defining and creating the graphical layout of web pages, including graphical elements and logos

- Perform unit, integration and factory acceptance testing and assist software quality control do site acceptance testing, including user acceptance testing

- Optimising all elements of a software solution: databases, applications, interfaces, etc.

- Produce database scripts for data manipulation

- Produce installation scripts and documentation

- Produce the relevant technical or user documentation for a system.

- Train users and administrators of information systems

- Participate in meetings with users

- Manage a development environment

- Register and keep updated incident or improvement tickets for information systems

Knowledge and skills

- Successful training in IT by a relevant institute

- Ability to participate in multi-lingual meetings, good communicator

- Capability of integration in an international/multi-cultural environment, rapid self-starting capability and experience in team working are mandatory

- Capability of applying formal quality standards in the IT environment

- High level of English

Education and experience

- Minimum 3 years in Software Development

- Minimum 2 years experience in the technologies and techniques relevant to the specific project or activity

Usability Expert

Nature of the tasks

- Organize, set up and execute studies using the following usability techniques: Focus Group, User Testing, Observational Analysis, Prototyping, Heuristic Evaluation and preparation of Style Guides adapted to the chosen technology

Knowledge and skills

- Ability to speak, write and read fluently in English

- Ability to apply high quality standards

- Excellent communicator at all levels

- Capability of working in an international/ multicultural environment

- Ability to lead and moderate multi-lingual meetings

- Strong capacity to give high level presentations

- Strong capacity in preparing and writing documents and reports

Education and experience

- University degree, in a relevant subject

- Minimum 5 years in the relevant subject

- Minimum 2 years experience dedicated to usability

Optional specific expertise

- Graphical design experience

Graphical Designer

Nature of the tasks

- Produce innovative graphic designs for both web pages user interface and portable devices

- Definition and creation of graphical contents

- User ergonomics

Knowledge and skills

- Ability to speak, write and read fluently in English

- Ability to cope with fast changing technologies used in graphical design

- Very good knowledge of graphical design tools (e.g. Adobe Photoshop)

Education and experience

- University degree, in a relevant subject

- Minimum 5 years with web interface design

- Minimum 2 years experience dedicated to graphical design

Optional specific expertise

- Usability studies experience

3.4. ANNEX 4 – Mock Up of the Common Gateway concept

The Common Gateway has been initially thought in order to have at least 3 areas:

- **Public area**, which would basically correspond to the landing page for any user, including external users and which could look something like this:
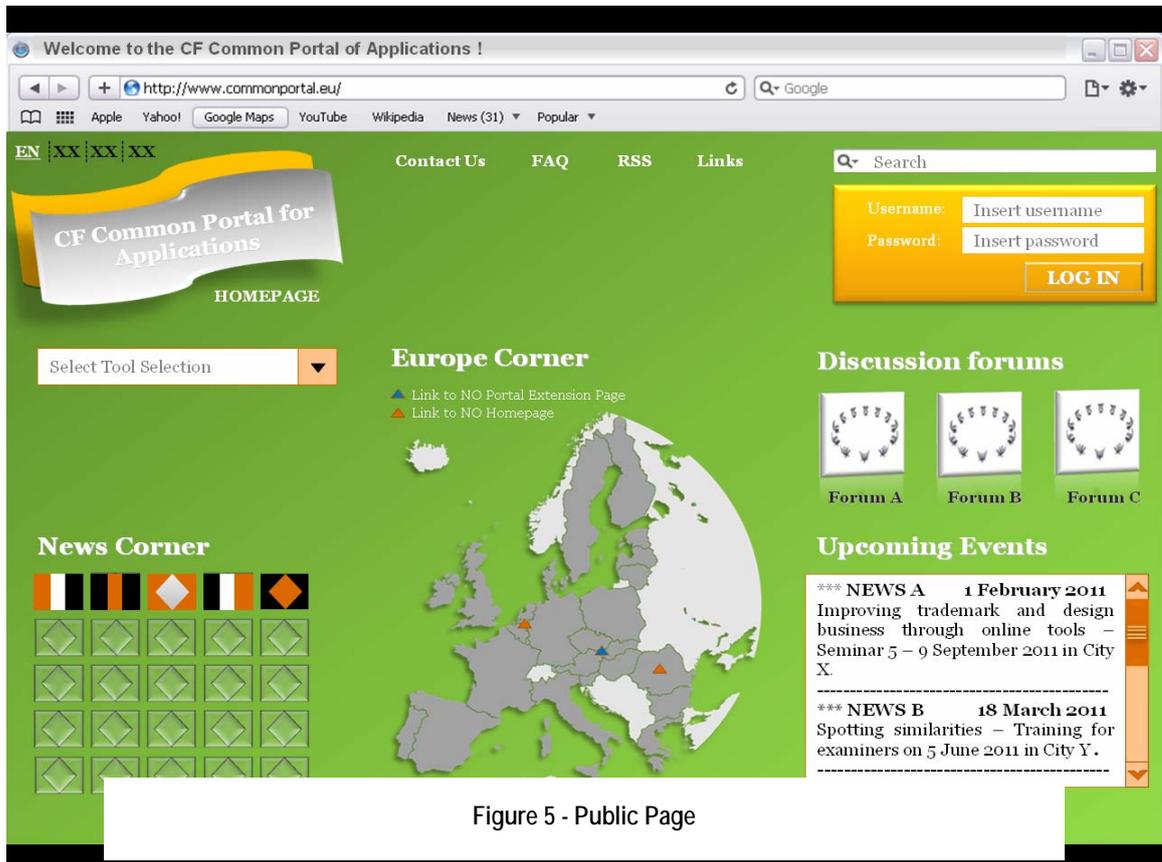

Figure 5 - Public Page

Figure 6 - News from one NO/UA

- Administration Area is accessible after authentication (Username/Password) and should present all the CF administration interfaces plus some other functionalities such as alerts or a news feeder. A simple proposal is shown in the figure below:
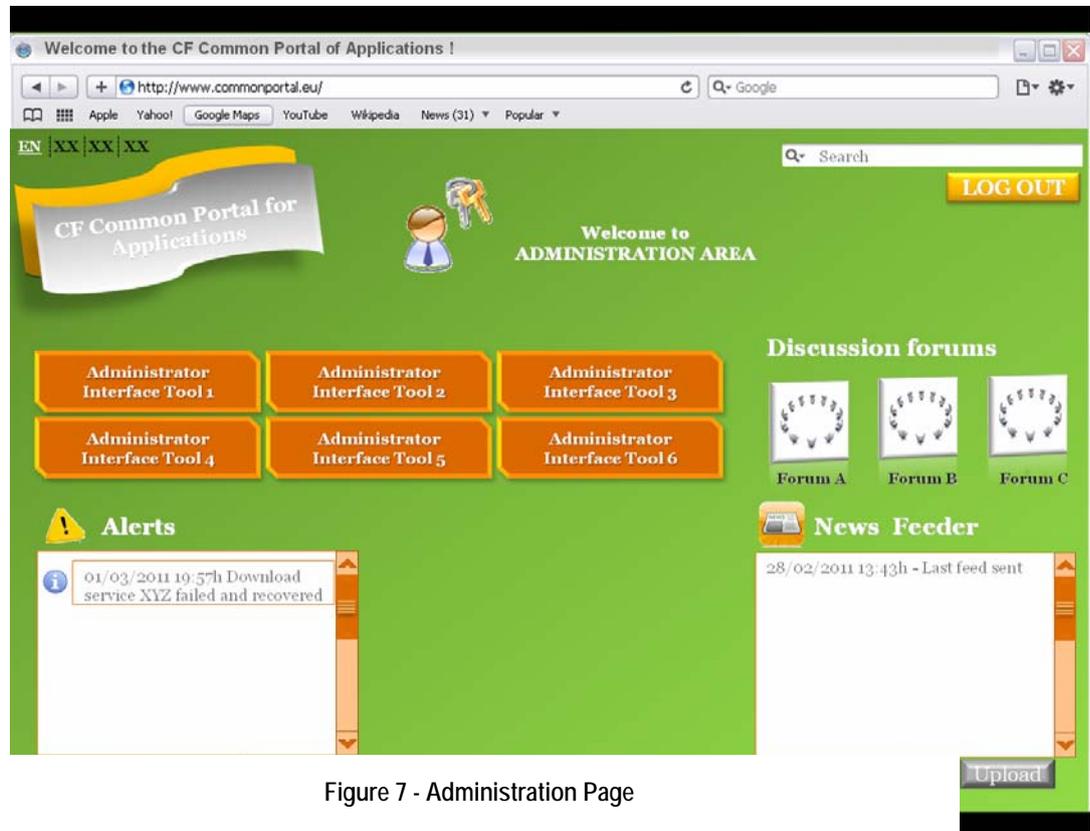

Figure 7 - Administration Page

- Extended pages will be created in collaboration with the NOs or UAs interested making profit of the Common Gateway infrastructure. Various features to include could be delegated to the NO/UA webmaster.

Figure 8 - Personalized Page