PROJECT SPECIFICATION

# APIs and integrations

Connect your tools to each other, or open your services to partners.

Fill-in template · English version

| | |
|---|---|
| Project | |
| Organisation | |
| Written by | |
| Date | |
| Version | |


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## How to use this template

- Answer under each question, then delete the questions and sections that do not apply to you.
- Examples in italics are fictitious: they show a useful level of detail. Replace them with your own situation.
- Priorities: M = must have at launch, S = should have, can follow shortly after, C = could have if budget or time allows.
- “Not sure yet” is a useful answer: it tells the provider which points to work out with you.

## Contents


01 Your organisation

02 Project background

03 Goals and success metrics

04 Users and usage

05 Functional scope

06 Points specific to this kind of project

07 Content, languages and accessibility

08 Existing systems and technical constraints

09 Security, personal data and compliance

10 After launch

11 Budget

12 Timeline and milestones

13 Governance and contacts

14 What we expect in your proposal

15 Appendices

## 01 Your organisation

Help a provider understand, in two minutes, who you are and who you serve.

| | |
|---|---|
| Organisation name | |
| Industry | |
| Countries and cities where you operate | |
| Current website and social media | |
| Number of people involved in the project | |

QUESTIONS TO ASK YOURSELF

- What do you do, and for whom?
- What sets you apart from your competitors?

Your answers

## 02 Project background

Explain where the project comes from and why it is starting now.

QUESTIONS TO ASK YOURSELF

- What problem should this project solve?
- What have you already tried, and what did you learn?
- Which systems must exchange data, in which direction, how often?
- Who will use the API: your teams, partners, customers?

> **Example:** *Our management software and our online shop do not talk to each other: every evening, someone copies the orders across by hand.*

Your answers

## 03 Goals and success metrics

State what will have changed once the project is delivered, and how you will measure it.

> **Example:** *No more manual re-entry between the two systems, and an alert whenever an exchange fails.*

| Goal | Metric | Today | Target | Deadline |
|---|---|---|---|---|
| | | | | |
| | | | | |

| Goal | Metric | Today | Target | Deadline |
|---|---|---|---|---|
| | | | | |

**Note:** Three well-chosen goals beat ten. Without a starting value, there is no progress to measure.

## 04 Users and usage

Describe who will use the solution, on which device, in which language.

QUESTIONS TO ASK YOURSELF

- Which users are the most numerous? Which matter most to you?
- Do they mostly use a phone? Roughly which kind?
- In what conditions: at the office, in the field, on an unstable connection?

> **Example:** *Developers at two partner companies integrating the API, and an internal team monitoring the exchanges.*

| Profile | What they come to do | Main device | Language(s) | Connection |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

## 05 Functional scope

List what the solution must do, in order of priority.

**Note:** Priority: M = must have at launch, S = should have, can follow shortly after, C = could have if budget or time allows. The suggested rows are starting points: delete, edit, add.

| Feature | Description and rules | Priority | Notes |
|---|---|---|---|
| List of data flows to automate | | | |
| Authentication of calling systems | | | |
| API documentation (OpenAPI format) | | | |
| Sandbox for partners | | | |
| Error handling and automatic retries | | | |
| Call logging and monitoring | | | |
| Rate limits | | | |

| Feature | Description and rules | Priority | Notes |
|---|---|---|---|
| Event notifications (webhooks) | | | |
| | | | |
| | | | |

| Out of scope: what this project does not cover | |
|---|---|

## 06 Points specific to this kind of project

The questions that always come up on this kind of project. Tick them off once settled.

### Existing systems

- [ ] List of systems, their vendors and versions
- [ ] Access to third-party documentation and test environments
- [ ] A technical contact at each vendor or partner
- [ ] Data formats: JSON, XML, flat files

### Reliability and security

- [ ] Expected call volume, and peaks
- [ ] Acceptable response time
- [ ] What happens when a system is unavailable?
- [ ] Sensitive data exchanged, and encryption
- [ ] Contracts with third-party vendors that allow the integration: to be checked

## 07 Content, languages and accessibility

Say who provides the copy, images and translations, and in which languages.

- [ ] Languages: French, English, local languages (Wolof or others); which one first?
- [ ] Translations: who writes them, who proofreads them?
- [ ] Existing copy, to rewrite or to create: who writes it?
- [ ] Photos and videos: real ones (team, premises, products) or to be produced?
- [ ] Logo and brand guidelines available as source files
- [ ] Accessibility: contrast, text size, keyboard navigation, screen readers
- [ ] Search engines: which queries should bring people to you?

## 08 Existing systems and technical constraints

Describe what already exists and what is imposed, to avoid surprises along the way.

QUESTIONS TO ASK YOURSELF

- Which tools, software or websites already exist? Which must be kept or connected?

- Domain name, hosting, accounts (app stores, social media, payments): in whose name are they registered, who has access?
- Is a technology, a host or a hosting country imposed on you?
- Do your users have entry-level phones, or a slow or expensive connection?
- Where will the API be hosted?
- Does a partner impose a format or a standard?

Your answers

## 09 Security, personal data and compliance

Spot sensitive data and the obligations to meet before choosing a solution.

- [ ] Personal data collected: identity, phone number, location, financial or health data…
- [ ] Who can access what: roles and permissions
- [ ] Backups: frequency, location, retention period
- [ ] Country where the data is hosted
- [ ] Informing people, consent, how long data is kept
- [ ] Formalities with your country's data protection authority

**Note:** These obligations vary by country and activity: have them checked by your legal adviser. This template is not legal advice.

## 10 After launch

Plan the life of the solution: maintenance, hosting, improvements, training.

- [ ] Corrective maintenance: response time for a blocking incident
- [ ] Security and dependency updates
- [ ] Hosting, backups and monitoring: who handles them, who pays?
- [ ] Training for your teams, and documentation
- [ ] Ownership of the code, content and accounts (domain, app stores, hosting)
- [ ] Reversibility: getting the code and data back if you change provider

## 11 Budget

Give a range: without one, the proposals you receive cannot be compared.

| | |
|---|---|
| Build budget you have in mind (FCFA, excl. tax): from … to … | |
| Yearly running budget (hosting, maintenance, licences) | |

| | |
|---|---|
| **Preferred payment schedule (for instance, at each milestone)** | |

| Item | Range (FCFA, excl. tax) | Comment |
|---|---|---|
| Discovery and design (workshops, mock-ups) | | |
| Development and testing | | |
| Copy, photos and translations | | |
| Hosting, domain name, licences (per year) | | |
| Maintenance and improvements (per year) | | |
| | | |

**Note:** A range, even a wide one, commits no one: it saves you from proposals that are out of reach or undersized.

## 12 Timeline and milestones

Give the dates that matter, and the ones that can move.

| Milestone | Target date | Fixed or flexible? | Comment |
|---|---|---|---|
| Data flow inventory approved | | | |
| Interface contract (specification) approved | | | |
| Integration in the test environment | | | |
| Tests with each partner | | | |
| Go-live | | | |
| | | | |

QUESTIONS TO ASK YOURSELF

- Does an event set a date (launch, trade fair, season, school year)?
- Who signs off each step on your side, and how many days does it take?

Your answers

## 13 Governance and contacts

Say who decides, who answers day to day, and how you will work together.

| Role | Name | Job title | Email and phone |
|---|---|---|---|
| Decision-maker (approves budget and deliverables) | | | |
| Day-to-day project lead | | | |
| Technical contact | | | |
| Content contact | | | |
| | | | |

QUESTIONS TO ASK YOURSELF

- How often do you want a check-in: every week, at each milestone?
- Through which channels: meetings, video calls, email, messaging?
- In which language will the project run?

Your answers

## 14 What we expect in your proposal

Ask every provider for the same things, so proposals can be compared like for like.

- [ ] Your understanding of the need, in your own words
- [ ] The proposed solution and technical choices, with reasons
- [ ] The timeline, milestone by milestone
- [ ] The team assigned to the project and each person's role
- [ ] A budget broken down by item, recurring costs included
- [ ] Maintenance and warranty terms
- [ ] References from comparable projects
- [ ] Code ownership and reversibility terms
- [ ] Assumptions made and questions still open
- [ ] A diagram of the flows and the proposed architecture
- [ ] The testing and monitoring strategy

| | |
|---|---|
| Proposal deadline | |
| Expected format (PDF, slides…) | |
| Where to send it | |

| | |
|---|---|
| **Selection criteria and their weight (price, timing, references, grasp of the need…)** | |

## 15 Appendices

Attach anything that helps explain the project.

| Document | What it contains |
|---|---|
| Brand guidelines, logo | |
| Websites or apps you like (and why) | |
| Diagrams, mock-ups or screenshots of what exists | |
| Useful internal documents (procedures, paper forms) | |
| | |