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TERMS OF REFERENCE FOR THE

SUPPLY, DELIVERY, INSTALLATION AND CONFIGURATION

OF

DOCUMENT MANAGEMENT AND TRACKING SYSTEM

I.   Background

The Maritime Industry Authority (MARINA) was created on 01 June 1974 as an attached Agency to the Office of the President (OP) with the issuance of Presidential Decree No. 474, otherwise known as the Maritime Industry Decree of 1974, to integrate the development, promotion and regulation of the maritime industry in the country. With the creation of the Ministry (now Department) of Transportation (DOTr) by virtue of Executive Order No. 546, the MARINA was attached to the DOTr for policy and program coordination on 23 July 1979.

By virtue of Republic Act No. 10635

"An Act establishing the Maritime Industry Authority (MARINA) as the Single Maritime Administration responsible for the implementation and enforcement of the 1978 International Convention on Standards of Training, Certification and Watchkeeping for Seafarers, as amended, and International Agreements or Covenants related thereto."

II.   GENERAL QUALIFICATIONS AND DOCUMENTARY REQUIREMENTS

1. The vendor should provide the required software, hardware and services as follows:

PARTICULARS	QTY	UNIT
Document Management And Tracking System	1	Lot No Limit in User Accounts
Server	1	Unit
Desktop	4	Units
Printer	14	Units

2. The vendor should comply with the requirements as to the following modules and functional specification

Software Specification

Accounts Management
- The system should have a one-time pin (OTP) for password.
- The system should have a password reset tool to be manage by the end user requester via email.
- The system should notify the administrator thru email for new request for change password.
- The system should have a link to user account profile.
- The system should have an avatar upload feature.
- The system should have user management to create new user accounts with specific roles such as employee, manager and administrator.
- The system should have a group management to create new groups with specific roles per folder.
- The system should be capable to use Google Login or Active Directory as login authentication.

Records Management
- The system shall have a Record Management – It can archive and purge document based on the retention period that was set. It has an advanced record retention and disposition that manage and organize the active and inactive files.
- The system should have a dashboard for private and public folders, uploaded documents and notifications.
- The system should have no limit in creation of folders and sub folders.
- The system should have a breadcrumb in folder path.
- The system should have a public repository where users can only view the uploaded/created record in assigned public folder.

- The system should have Document Tracking/History – efficiently track the movements and activities of electronic documents.
- The system should have a private repository where only permitted users and groups are allowed to view and edit a record.
- The system shall have lock feature for folder.
- The system shall be capable to assign user and groups to specific folder.
- The system shall have a workflow management for automating a process per folder.
- The system should have a conditional process in workflow management such as:
  - Workflow process should have condition in getting the file name.
  - Workflow process should have condition in getting the index.
  - Workflow process should have condition in getting the authors name.
  - Workflow process should have condition in getting the date uploaded.
- The system should be capable to upload a single or bulk scanned document
- The system should be capable to read Optical Character Recognition (OCR) – It convert images into searchable machine encoded text.
- The system should have Watermark – It can embed watermark on the images stored in the system.
- The system should have a Indexing – It can provided unique classification through the document metadata or indexes extracted from the documents' contents
- The system should have Document Tagging functions/features – It capture a metadata (tagging) of electronic documents that creates database mining when information is needed.
- The system should have Document Linking – It can link documents to a certain documents that can build child or parent relationships. It also allows users to link and organize documents into a logical form.
- The system should have no limits in index field.

- The system should have a field for upload date and expiry date for archiving purposes.
- The system should have an automatic archive feature.
- The system should have a Document Version Control – It provide check-in/check-out facility that prevent the documents from being overwritten or deleted. The documents can be updated by any user who has permission to update.
- The system should be capable to set the parameters for archiving.
- The system should be capable to upload an index file in csv format and automatically link the attributes in designated file names without any limit.
- The system should be capable to capture specific index in uploaded document and automatically fill up the designated fields.
- The system should be capable to route records to one or more user accounts.
- The system should be capable to route two or more tasks in single or multiple accounts.
- The system should be capable to sign a document using digital signature.
- The system should be capable to plot the exact x and y axis for insertion of digital signature by the assigned user.
- The system should be capable to add two or more signature in single document.
- The system should be capable to view the previous document uploaded.
- The system should have Add notes functions/features –. It can add notes to a particular documents.
- The system should have Document Life Cycle management – able to set retention periods and purging schedule of each document.

Search and Retrieval Management

- The system should be capable to search data such as index, file name, date, author name, uploader name, document type and content of the scanned document.
- The system should have an advance content search that can search OCR scanned documents.
- The system should have a filtering in search result to easily track the documents.

Reports Management

- The system should be capable to count all the uploaded records by folder or user.
- The system should be capable to count all the pages in every record uploaded.
- The system should be capable to display the accumulated storage and total storage capacity.
- The system should be capable to display the uploaded record of each user account.
- The system should be capable to display the total deleted record of each user account.
- The system should be capable to display the activity of each user account with date stamp.

Notification Management

- The system should have Email Notification functions/features – It notify the user his/her pending actions in the workflow features of the document management system.
- The system should be capable view real-time notification in dashboard.

System Management

- The system should have Retrieval – Retrieve the electronic document by specifying certain information of the document including tagging and document referencing. Supports a wide variety of browser including Chrome, Firefox, Explorer. Compatible with smartphones and tablet using Android, iOS for smartphones.

- The system should be accessible in web browser and can support multiple platforms such as Internet Explorer, Google Chrome, Mozilla Firefox.

- The system should be in PHP programming language using a Service Oriented Architecture software design

- The system should be in Bootstrap template and responsive view from desktop, tablet and mobile.

- The system should have policy for brute force attacks.
  - Accounts with 3 failed login attempts should block.
  - Recover of password should be done by the assigned administrator using administration panel.
  - Idle time of 15 minutes should automatically log out.
  - Only alpha and numeric keys are allowed in username and password field.

Hardware Specifications

1. Server

- Processor: Intel Xeon Quad Core E5-2407 2.2Ghz
- Chipset : Intel C602 Chipset/X9DBL-iF
- CPU Support   : Dual Capable
- System Memory : 1 x 8GB DDR3-1333 ECC Reg. 6 DIMM sockets
- Onboard VGA : Integrated Graphics Controller
- Internal Storage : 2 x 500GB Enterprise SATA HDD
- Expansion Slots : 1 PCI-Express 3.0 x8
- Onboard SCSI/SATA : 4 x SATA 2.0 3Gbps with RAID 0, 1, 5, 10 support

- Operating System : Windows Server 2012
- Cooling System :4 x 4cm Cooling Fan
- Onboard LAN : Dual Gigabit LAN (1 x Intel i217LM & 1 x Intel i210AT)
- Peripheral Bays : Slim DVD Drive
- Drive Bays : 4 x 3.5" Hotswap SATA Bays
- Power Supply : Redundant 700Watts Gold Level

2. Desktop

- Intel Core i7 7700 3.6GHz, 8MB Cache, 4 cores Kabylake 7th Gen
- Intel B250 Express Chipset
- 4GB DDR4 2400 up to 32GB (8gb per Dimm)
- 1TB SATA3 HDD
- 16x DvD-Super multi drive
- Intel HD Graphics 630
- Integrated high-definition, 5.1-channel surround sound
- LAN: Gigabit Ethernet
- Uninterrupted Power Supply (1 KVA)
- Pre-loaded with
    - Operating System - Windows 10 SL 64-bit
    - Latest Licensed MS office (Word, Excel, Powerpoint)
    - Anti-Virus (Two (2) Years Subscription)

3. All-In-One Ink Tank Printer

- Print Technology
    - Print Method: Inkjet
    - Maximum Print Resolution:5760 x 1440 dpi
    - Minimum Ink Droplet Volume:3 pl
    - Control Panel:2.2" Mono LCD
    - Print Direction: Bi-directional printing, Uni-directional printing
    - Nozzle Configuration:180 nozzles Black, 59 per color (Cyan, Magenta, Yellow)

- Print Speed
    - Photo Default - 10 x 15 cm / 4 x 6 " Approx. 69 sec per photo
    - Max Photo Draft - 10 x 15 cm / 4 x 6 " Approx. 27 sec per photo
    - Draft, A4 (Black / Color):Approx. 33 ppm / 15 ppm
- Copy Function
    - Reduction / Enlargement:25 - 400%, Auto Fit Function
    - Maximum Copy Size: A4
- Copy Speed:
    - ISO 29183, A4, Simplex (Black/Color):Approx. 7.7 ipm/3.8 ipm
- Scan Function
    - Scanner Type : Flatbed color image scanner
    - Optical Resolution:1200 x 2400 dpi
    - Max Document Size:216 x 297mm (8.5 x 11.7")
- Scan Speed:
    - Flatbed (Black / Color):300 dpi: 16 sec / 34 sec
    - ADF Monochrome (Simplex / Duplex):300 dpi: 2.0 ppm
    - ADF Color (Simplex / Duplex):300 dpi: 2.0 ppm

    ADF Specifications:
    - Support Paper Thickness:64-95g/m
    - Paper Capacity:30 sheets (64g/m)
- Fax Function:
    - Fax Resolution (B/W):Standard: 8 pels/mm x 3.85 lines/mm

        Fine: 8 pels/mm x 7.7 lines/mm

        Photo: 8 pels/mm x 7.7 lines/mm
    - Fax Resolution (Color):Fine: 200 x 200 dpi

        Photo: 200 x 200 dpi
- Connectivity:
    - Standard : USB 2.0

        Network : Ethernet

        Wi-Fi IEEE 802.11b/g/n

        Wi-Fi Direct

- Supported OS and Applications:
  - Supported OS: Windows XP / Vista / 7 / 8 / 8.1 / 10
    Mac OS X 10.6.8 or later

III. MAINTENANCE AND TECHNICAL SUPPORT

- Provide a five (5) hour response time on-site support, 8:00 a.m. to 5:00 p.m., Mondays to Friday. On-next-day support if issue cannot be resolved during working hours.
- Twenty four (24) hour resolution time and provision of service/replacement units if hardware issue is not resolved within 24 hours.
- Provide telephone support / helpdesk facility for initial analysis and resolution of hardware and software related problems. Telephone support shall be provided 24 hours x 7 days.

IV. WARRANTY

- The provider warrants that it shall conform strictly to the terms and conditions of this Terms of Reference.
- A warranty period of twelve (12) months shall commence upon issuance of the Certificate of Acceptance.
- The provider shall not assign, transfer, pledge, or subcontract any part or interest herein.

V. TRANSFER OF TECHNOLOGY

- The bidder must provide a comprehensive training program to qualified staff/employee of the Maritime Industry Authority (MARINA).
- The winning bidder shall submit Program of Instruction (POI) for review and approval of the Marina.
- Appropriate manuals (e.g. Equipment, User, Operational Manuals...etc) shall be provided to each participant and written in a very simple manner that everybody can understand.
- Training and Technology Transfer should be conducted before final project acceptance.
- All expenses during the conduct of training shall be borne by the winning bidder.

VI. ACCEPTANCE BY MARINA

- The MARINA technical personnel must review and conduct a software and hardware evaluation of the delivered service and equipment based on its functions. MARINA shall also conduct User Acceptance and Testing for all customized/ developed software components. All deliverables mentioned above shall be checked by MARINA technical personnel and complied by the vendors before the final acceptance and turnover of the project.

VII. BIDDER'S QUALIFICATIONS

- Bidders must have completed/installed electronic document tracking or records management system with amount equivalent to fifty percent (50%) of the ABC within two (2) years from the date of submission and receipt of bids.
- Completed at least three (3) similar projects in supply, delivery and installation of computer hardware, within the last three (3) years. This should be vouched by a Certificate of Acceptance issued by the end-user.
- The Bidder should have been operating in the Philippines for at least five (5) years and is registered with SEC or DTI.

VIII. TECHNOLOGY TRANSFER

- The winning bidder shall provide free technology transfer for the proposed products. The end user training/workshop can either be conducted in MARINA's premises or provider's training facility.
- The provider shall provide a comprehensive training program for all the MARINA personnel involved in the implementation and operation of the system. The provider must list all personnel to be trained, sequence of training by group or subgroup and timing required to meet the requirements of the implementation plan.

- The type of training will depend on the function of the participants such as but not limited to System Administration, Database Management, Network Administration, Security Administration, Content Management and others that are deemed necessary in the proper implementation of the system.

  The numbers of participants to be trained are as follows:
  1. Two (2) personnel for System Maintenance and Development
  2. Two (2) personnel for Database Management
  3. Fifty (50) personnel for End-User

- The training shall be detailed enough for the technical participants to be able to completely operate and maintain the whole project. The training shall also include trouble shooting, preventive maintenance, and continuous operation of the system.

- Training and Technology Transfer shall be conducted before final project acceptance. All expenses incurred during the training shall be borne by the winning bidder.

IX. DOCUMENTATION

- The provider shall provide complete documentation for every deliverable and at every end of each development stage and milestone that will be submitted to MARINA for approval. All documents shall be owned by the MARINA and shall reserve the right to reproduce at no additional cost. All documentations shall be written in English and must be available in both soft and hard formats.

- The provider shall provide user and system manuals and technical materials of all IT equipment including all of its components. Complete documentation of hardware, software, utility and CDs shall be provided including the inventory of components and serial numbers.

X. BACKUP AND RECOVERY

- The provider shall develop backup and recovery procedures in maintaining the application system and the database.

XI. DISASTER RECOVERY

- The provider shall provide a Disaster Recovery Program/Plan which shall describe how the MARINA shall deal with potential disasters. The Disaster Recovery Plan shall be detailed enough for all possible disasters such as power outage, computer failure, natural calamities or human error, among others. It shall contain the comprehensive procedures necessary to resume business to its normal operation in the least possible time. Moreover, the responsibilities of the people involved in the operation shall be thoroughly defined.

XII. APPROVED BUDGET FOR THE CONTRACT

The Approved Budget for the Contract (ABC) is One Million Five Hundred Eight Thousand Pesos (P1,508,000.00) through the General Appropriations Act of 2018 Capital Outlay and MOOE, inclusive of all government taxes and charges.

XIII. PROJECT TIMEFRAME

- The project shall be completed within a period of Forty-Five (45) days upon receipt of the Notice to Proceed.