



OGDCL PAKISTAN  
OIL & GAS DEVELOPMENT  
COMPANY LIMITED

**OIL & GAS DEVELOPMENT COMPANY LTD**  
**SYSTEMS DEPARTMENT**

**Terms of Reference (TOR)**

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**IMPLEMENTATION OF DOCUMENT MANAGEMENT SYSTEM (DMS)**

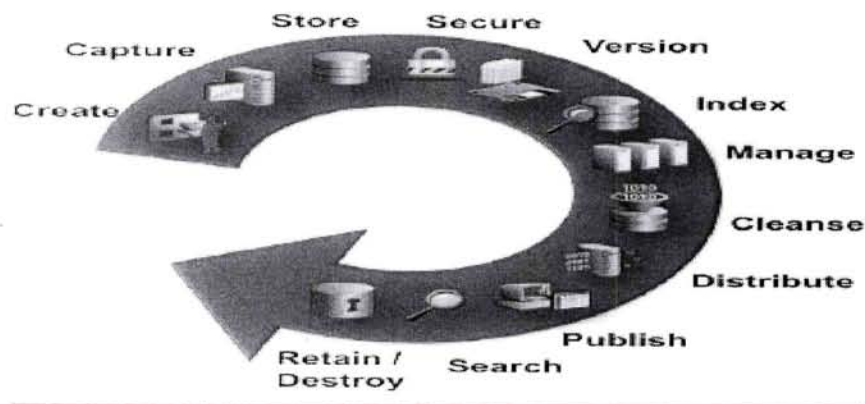
*Note: Bidders are requested to read this document carefully and provide complete information required in this TOR. All information required in the Technical Evaluation Criteria must be provided. OGDCL reserves the right to reject Proposals with in-complete or partial information.*

## 1.0 OVERVIEW

Oil and Gas Development Company Ltd (OGDCL) is Pakistan's leading E&P sector company, having operations in all the four provinces. The detailed information about the Company can be obtained from its website [www.ogdcl.com](http://www.ogdcl.com)

OGDCL intends to deploy an Enterprise Document Management Solution (DMS) for transformation of paper-based systems into online digital records systems with automation of Process movements through workflow management. Goal is to reduce paper based environment and implementation of dynamic workflows to automate process movements and enhance efficiencies of the organizational functions.

DMS enables digital work environment to encompass methods and tools used to create, capture, manage, store, route, preserve, deliver, archive contents/documents with workflows enabled features. Following is the **Documents Maintenance Cycle** of standard DMS solution.



DMS is an elementary requirement for OGDCL to ensure effectively and efficiently, management and availability of structured and unstructured contents/documents of an organization, created by; desktop applications, email system and business application systems. The ensures readily availability of documents/contents when needed for decision-making and operational purpose.

### 1.0 OBJECTIVES:

- Facilitate in creating, capturing, organizing, storing and archiving documents/content to ensure that business decisions along with evidences are documented, preserved and easily accessible to the relevant stakeholders.
- Enhance efficiency through easier access and retrieval of records by online document management system
- Automated and optimized workflows that enhance control and productivity.
- Increased security through transparent and auditable processes.

- Elimination of instances of loss, duplication of documents.
- Reduced storage and distribution costs.
- Ability to manage structured and unstructured contents.

The added benefits are; enhanced business efficiency, productivity and online readily availability of contents/documents. Firms who are qualified, experienced and able to provide the desired services for the project "Implementation of Enterprise Content Management Solution" are invited to submit their proposals.

## 2.0 SCOPE OF WORK

DMS system should be a single repository to access latest document version, whenever needed for decision making and operational activities. The contents need to be managed, shared and archived. DMS system can properly manage entire life cycle of different content types. Support different search criteria and retention policies. The system is able to automate common tasks by defined workflows.

The product's license detailed is given below:

S.No.	Licenses Type	Nos.
1	Concurrent/multiple login users licenses	25
2	Named / user based licenses	15
3	View users license	10
<b>Total Number of Licenses</b>		<b>50</b>

## 2.1 Methodology

1. Bidder will be required to conduct a detailed requirements analysis and prepare a System Requirement Specifications (SRS) for the proposed system covering all processes and workflows. The bidder will submit the SRS document for approval by OGDCL. OGDCL will have right to accept the document or propose necessary amendments. The bidder will incorporate these amendments and hand over the final version of SRS document and initiate the system implementation process.
2. The bidder must be able to implement the proposed solution within 180 days after signing of the contract. Three years support services will start effect from signing of go-live certificate. A clear commitment should be stated in this regard in technical proposal.

## 2.2 General Requirements

1. On-premises implementation of proposed solution.
2. Should support multiple user over LAN/WAN.
3. Should be user friendly and supported by user and technical guides.



4. Multiple browser support.
5. Optimized Mobile Apps support.
6. Centralized management control and administration.
7. Version control Management.
8. Notifications for activities performed in the repository (such as functional owners and administrators, etc.)
9. Notification on various actions (such as task assignment, overdue etc.)
10. Customized dashboard for users, administration and management.
11. Import/export features such as ability to import contents outside of the DMS.
12. Functionality to convert content into Electronic Records/archive through manual & automatic processes
13. Backup and recovery management.
14. Support to work with industry standard database systems such as Oracle/SAP/Microsoft products, IBM DB2/My SQL, etc.
15. Should be modular and scalable to meet growing enterprise requirements level with ability to increase in number of users, process without requiring any re-implementation:
16. Selected bidder shall be responsible to identify and address in coordination with OGDCL team, the hardware and software dependencies to successfully implement the overall solution.
17. The selected bidder shall provide and strictly follow the detailed project plan to complete the implementation within the given project timeline as specified in this document.
18. Maintain complete audit trail of all the activities and transactions as per standards.
19. Integration with standard OCR/ICR enabled scanning machines
20. Solution shall include requisite licenses as well as maintenance and technical support services in accordance with the Service Level Agreement during and after the implementation for the period as specified in this document.
21. The bidder will provide 03 years support and maintenance services after successful implementation.

### **2.3 FUNCTIONAL SPECIFICATIONS**

Should provide solution for creating, capturing, organizing, storing and archiving documents/content and automation of tasks with workflows.

### **2.4 Detailed specification / features include:**

Software should provide under listed requirements. It is emphasized that, the list is not exhaustive and will be binding upon the selected vendor to include any additional requirements meets during requirement analysis.

- ✓ **Integration with Business Processes and Back-End System:**

System should provide out-of-the-box support for integration with business applications across enterprise like Email, ERP and legacy applications. Provide Real-time/Direct/Embedded Integration with Enterprise Content Management's (DMS) repository system. Full API support for integration of Third Party applications.

✓ **Capabilities:**

- Manage structured and unstructured content types like: Microsoft Officedocuments, PDFs, Scannedimages, Graphics, Videos, Engineering documents etc.

- **Search:**

searching and connecting relevant information from a single source point which is the central repository of documents and records. Provide full-text search, common search syntax, filtered search results. End-users quickly find within authorized access domain. Provide advanced search capabilities including custom forms and metadata search etc.

- **Metadata:**

Support for automated, manual and inherited metadata values on all types of content and the associated classification of content.

- **Versioning:**

Automatic tracking and storage of each file version along with auditing, archiving and the ability to revert to a previous version of a document if needed.

- **Conversion Formats support**

Ability to automatically generate content in other formats like (PDF, XML, HTML etc.). For example, engineering department managing an image library will require system to automatically generate different versions of a high resolution image – a thumbnail, a low resolution version, a black & white version, etc.

✓ **Readily availability of Content:**

End user can securely access their content when need it and from wherever they might be within a centralized repository. System is designed to be integrated not only with existing business applications but also accessible from a variety of mobile devices.

✓ **Automated Capture and Image Processing**

System should provide flexible set of features and functionality that enable automation of paper-based processes with support for centralized or distributed scanning, forms recognition, classification and the ability to easily integrate into many different business processes. Once captured, system recognizes the form, extracts data from fields and routes it into proper business process by applying proper classifications based on



these values and business rules. Proper classification and assignment of metadata ensures that the appropriate storage, archiving and retention policies will be applied.

✓ **Records Management and Retention Policies**

System enables both retention and disposition of information. Allowing to define, manage, execute records and retention policies for all enterprise content as per company's policies.

✓ **Workflow and the Movement of Information**

System should have sufficient and expandable workflow capabilities to meet the varied business needs. Workflows can vary in complexity; from simple review and approval processes to extensive processing of all structured and unstructured document creation, management, approval, and release. Workflow status tracking features.

✓ **Digital Asset Management**

Digital content of photographs, drawings and videos. These files require special processing and handling due to their typical large file sizes and unique metadata requirements. Searching for and finding the right version of an image or video to use. DMSsystem allows to utilize storage effectively and provide easy access to the correct photos, video and engineering drawings. Users of rich media can take advantage of services such as:

- Workflows and version control with automated policies that govern security, archiving, content conversion and disposition.
- Content check-in and accessibility from anywhere with Web-based and desktop interfaces.
- Compression of content to decrease bandwidth demands and storage requirements

✓ **Enterprise-Class Capabilities:**

System improves and manages content, meets current and future requirements of organization in following areas:

- **Scalability** – System should be easily scale large number of users, millions of documents and manage all unstructured content.
- **Security** - Administrators can define and apply security access controls as needed for specific users, groups, departments or across entire organization. Meets advanced security options like data encryption and additional restrictions on content repository.
- **Manageability** - Auditing and reporting - A centralized administration, better manageability, and lower cost of ownership. Provides single platform that enables administrator to manage the content services, access all

reports and logs from a centralized console. Ability to drill down for each activity.

- **Service Oriented Architecture (SOA)** with a complete set of APIs - ability to integrate with other systems across the organization. With integration into a SOA Suite, improve the efficiency and agility through rules-driven, business process automation.

## **2.5 Services Requirements:**

The successful bidder will be responsible for providing supply and implementation services which include:

- Provision of all required licenses.
- Testing and implementation of DMS system.
- Installation and configuration of software.
- 03 years support and services.

## **3.0 MANDATORY REQUIREMENTS**

- 3.1 Bidder must be either Original Equipment Manufacturer (OEM) of Enterprise Content Management (ECM) or OEM Authorized partner (enclose partnership certificate)
- 3.2 Have country wide offices with minimum of 10 number technical resources country wide.
- 3.3 Must have support office in Islamabad.
- 3.4 Bidder must have at least 05 (five) years of experience in IT field.
- 3.5 Proposed solution / Product must have been deployed in at least 02 (two) organizations of comparable business scope and size. (Provide satisfaction letters of the organizations)
- 3.6 Company must have minimum of 100 million Pak Rupees turnover per year (provide audited financial statements for the last three years)
- 3.7 Vendor must be registered with SECP, Income Tax and Sales Tax Departments

## **4.0 PROJECT TIME LINE AND DELIVERABLES**

Project completion time is 06 months after the issuance of signing of Contract. Three years support services will start with effect from the signing of go-live certificate.

### **Implementation and Testing**

List of Deliverable and their estimated completion time

#### **4.1 System Requirement Specification (SRS) Document: 40 days.**

The selected firm will carry out a detailed analysis exercise, document the current processes and prepare a detailed SRS document. The document will elaborate all the workflows required to be automated/customized in the software, integration with the



current infrastructure and all the other configurations required to be done to made software go-live. This document will be submitted to OGDCL for approval.

**4.2 Design Documents: 20 days.**

Design and Configuration document including both Server configuration and Client configuration will be provided.

**4.3 User Acceptance Tests (UAT) Certificate and Go-live: 85 days.**

After implementation a detailed UAT will be carried out and validated by OGDCL users as per testing plan.

**4.4 User Manuals & System Documentation (both hard & soft copies): 30 days.**

4.4.1 Detailed user manuals for end users will be provided, describing the system usage with screen shots.

4.4.2 Separate manuals for system administration, installation, configuration, recovery and backup procedures.

4.4.3 Complete documentation of Design, architecture and other associated information in the form of Paper Manuals, CD and online

**4.5 Training: 05 days**

A comprehensive training of the software has to be provided to 10 user focusing on technology transfer and capacity building of OGDCL's employees. Bidder will also provide:

4.5.1 Hands-on training to end users for smooth implementation and working of the software.

4.5.2 Administrative training to the technical staff of workflow creation, configurations and system administration.

**5.0 PROPOSALS**

Proposals are invited through open **competitive bidding** process on **Single stage – two envelope** procedure of technical and financial proposals in separate sealed envelopes for “supply, Installation and Implementation of Ccontent Mmanagement System” along with three (03) years support and maintenance services extendable further with mutual consent.

**5.1 Proposal Format and Evaluation Criteria**

The format for submission of technical proposal is attached as Annexure-I and format for financial proposal is attached as Annexure-II. The bidders are required to submit proposals in specified formats. The proposal not following the prescribed formats will be rejected and the firm will be declared technically non-responsive.

The bidder shall deliver three copies of each proposal, which shall be physically separated, bound, sealed and labeled as:



- Financial Proposal for DMS
- Technical Proposal for DMS

## 5.2 Evaluation Criteria

The criteria for technical evaluation of bids is given at Annexure - III. The financial proposal of technically non responsive bidders will be returned unopened.

## 5.3 Weightage

The bid will be weighted as:

- Technical Proposal Weightage = 60%
- Financial Proposal Weightage = 40%

$$\text{Financial Points} = \frac{\text{Lowest Price}}{\text{Quoted Price}} \times 40$$

## 6.0 PAYMENT SCHEDULE

Payment will be made according to the following schedule.

- 6.1 First payment**- 20% of the total cost to be made after completion of 4.1&4.2 of deliverables i.e. handing over of SRS and design documents.
- 6.2 Second payment**- 30% of total cost to be made after completion 4.3 of deliverables i.e. after submission a signed UAT certificate.
- 6.3 Final payment** - to be made after go-live on submission of signed go-live certificate.
- 6.4 Three years support services** will start with effect from signoff go-live certificate and will be paid six-monthly on submission of dully verified invoices.

**TECHNICAL PROPOSAL**

Bidders are therefore advised to provide complete information (required below) in their Technical Proposal.

a) **Company Profile with;**

- i. Brief about the Bidder with years of service
- ii. Expertise available with CVs of the professionals indicating projects done and certifications obtained
- iii. List of companies where the solution is implemented

b) **Description of Enterprise Content Management Solution**

- i. List of all the features of the Proposed Solution
- ii. Integration Mechanisms with existing applications
- iii. Security Features

c) **Proposed Project Team**

Complete detail of all the proposed project team members specifying;

- i. Project Position
- ii. Professional Expertise
- iii. Education
- iv. No of Years with the Company
- v. Current position in the Company and no. of years at that position.

d) **Implementations Plan**

- i. A comprehensive Project execution and implementation plan (both Soft and hard copy)clearly defining the software implementations, customization and rollout.
- ii. Roles and responsibilities of vendor and OGDCL should be clearly mentioned.
- iii. Risks Identification and mitigation plan
- iv. Operation and support plan
- v. Post Implementation transition plan
- vi. Security Implementation Plan
- vii. Project Deliverables
- viii. Staffing and any other requirements /dependencies from OGDCL

e) **Training Plan**

Complete Training Details should be provided which includes

- i. Training Methodology
- ii. Training Course description, duration, No of Trainees, Training Location



- iii. Training Aid provisioning, (Who will be responsible for providing the training resources)
- iv. Levels of training, End Users, Administrators, Train the Trainer Detail
- v. Online availability of Training and tutorials.

f) **Technical and Software Support Details**

The bidder should provide details of technical Support plan and procedures which includes

- i. Company's procedure/methodology to provide ongoing support and maintenance services
- ii. Resource allocation for support and maintenance.
- iii. Structure of technical support department/section.
- iv. Availability of Technical support team.
- v. Details of support issues logging and handling.
- vi. Online provision of complaint status.
- vii. Software upgrades support services.

g) **Change Request Form**

The bidder should provide a Change Request Form and quote price for charging additional scope of work (if needed by OGDCL) as per format(at Annexure VI) included in financial bid format. This should include method for determining extent of work e.g. man-days with rates for charging additional scope of work. This will be needed if OGDCL requires any major change or addition during or after development, which is not covered in the current TOR.

h) **International Certifications**

The bidder will provide copies of ISO and any other certifications of the acquired.

i) **Compliance Statement**

The bidder will submit compliance statement that all requirements mentioned in this TOR will be fulfilled (any requirement that cannot be fulfilled must be mentioned specifically).

j) **Additional Requirements**

The bidder will clearly any define any third party software or hardware requirements or any other dependencies along with the license fee cost etc.

**FINANCIAL PROPOSAL**

<b>Sr No</b>	<b>Item</b>	<b>Qty</b>	<b>Unit Price (Pak rupees)</b>	<b>Total Price inclusive of (all taxes) except PST/ICT (Pak rupees)</b>
1	Software License Cost(As given scope section) i) Concurrent/multiple login users licenses	25		
	ii) Named / user based licenses	15		
	iii) View users license	10		
2	Implementation and Testing As per Sr. No. 4	Lump sum		
3	Training	10		
4	Three years maintenance & support services cost			
	<b>Total of (1+2+3+4)</b>			

***Financial Notes:***

1. Prices should be inclusive of all applicable taxes, duties, levies (except provincial sales tax / ICT tax).
2. Payments to vendor will be made as per Payment terms defined in TOR and in 100% PKR against verified invoices.
3. The bids will be weighted as under and contract will be awarded to the highest scoring bidder.
  - a. Technical Proposal Weightage = 60%
  - b. Financial Proposal Weightage = 40%

$$\text{Financial Points} = \frac{\text{Lowest Price}}{\text{Quoted Price}} \times 40$$

4. Bid Bond / Security amounting to PKR:280,000/=is to be attached/ provided with the technical bid. Please see master set of documents for further detail.



**TECHNICAL EVALUATION CRITERIA**

*NOTE: Bidders are advised to carefully read evaluation criteria and provide complete information in each category. In-complete or partial information will not be weighted.*

<b>Description</b>	<b>Criteria and Nos.</b>	<b>Allocated Score</b>	<b>Maximum Score</b>
<b>Company Experience</b> <i>Number of years' of experience.</i>	<ul style="list-style-type: none"><li>• 05 years to 10 years</li><li>• Above 10 years (one 1 number for each year up to maximum of 20)</li></ul>	14	20
<b>Detail of Product and Customers</b> <i>Deployment of proposed product by the bidder in organization of comparable business scope.</i>	<ul style="list-style-type: none"><li>• 02 product deployments</li><li>• 1 number for each further deployment</li></ul>	14	20
<b>Professional Qualification</b> <i>(Attach CVs of related professionals minimum of 10)</i>	<ul style="list-style-type: none"><li>• IT related Bachelor degree (16 Years)</li><li>• 1 Number for Certification/Above 16 Years Education</li></ul>	14	20
<b>Project Team</b> <i>(PMO of professionals to be deployed on the project)</i>	<ul style="list-style-type: none"><li>• 04 Members Team</li><li>• 1 For each additional Member</li></ul>	11	15
<b>OEM Partnership Status</b>	<ul style="list-style-type: none"><li>• Platinum</li><li>• Gold</li></ul>	15 11	15
<b>Company Financial Strength</b> <i>(Enclose last three years audited financial statements. Duly signed by CA Firm. Minimum 100 million)</i>	<ul style="list-style-type: none"><li>• Above 150 million PKR/year</li><li>• From 100 million PKR / year to 150 million PKR/year</li></ul>	10 7	10
<b>Grand Total</b>		100	
<b>Qualifying score:</b>		<b>• Each category 70%</b>	

Obtained Technical evaluation nos. will be weighted @rate 60% as per s.no. 5.3.

## Annexure-IV

### CHANGE REQUEST FORM

<b>Additional Scope of Detail</b>	<b>Man-Hours (1)</b>	<b>Rate (2)</b>	<b>Total (1+2)</b>
1.			
2.			
3.			
Total			

- For any additional development other than mentioned at 2.0, vendor must provide man hour cost of the resources at discounted rate for future reference. Change Management request will not be part of this contract.
- Change management cost should be quoted category wise like major, minor, free etc.