TERMS OF REFERENCE

**DESIGN, DEVELOPMENT AND DEPLOYMENT OF THE
JHMC DOCUMENT TRACKING SYSTEM (DTS)**

I.INTRODUCTION

JHMC Document Tracking System (DTS) will be designed and developed as a solution to improve the efficiency of retrieving documents online at any time and tracking the movement of documents in and out of the JHMC office.

Each document can be logically registered, preserved, retrieved and renewed at high speed while tracing the required documents or files. Thus, efficiently performing an office work, reduced volume of consumed paper and minimizing work space.

II.OBJECTIVE

To design, develop, and deploy a comprehensive computerized and web-enabled DTS for JHMC which is fully functional and user friendly. Also, to help track and manage transactions in a manner that provides the right information to the right set of people at the right time for efficient process flow and decision making.

III.APPROVED BUDGET FOR THE CONTRACT (ABC)

Three Hundred Pesos (Php 300,000.00) inclusive of all applicable taxes.

IV.SCOPE OF WORK

1. User Requirement Assessment

   The Consultant shall:

   a. Improve familiarity with the project activities through project documentation, field visits, and discussions with different stakeholders.

   b. Determine detailed user requirements for the Information System based on business requirements of JHMC at various levels including:
      - Determination of stakeholders (all who have a role in data acquisition, processing, reporting, or use/decision making)
      - Determination of various types of reporting content, formats, and frequency
      - Basic information flow requirements (into, within, and out of the JHMC)
      - Additional hardware/ software/ dataset requirements.

   c. Detail design recommendations in a Systems Requirement Study for the proposed DTS. The design should be based on close interaction with the JHMC

and be flexible to incorporate changes in activities or future phases of the project/program.

2. JHMC Document Tracking System

   a. Data Management
- The Dashboard (Main Window). The Dashboard is divided into four (4) main parts:
  - i. Ribbon bar (Menu)
  - ii. Navigation Pane (Folder Structure, Tasks and Messages, Bulletin Board)
  - iii. List View Pane (List of documents)
  - iv. Details View (Display) Pane – This pane displays details about the currently selected document in the List View Pane
- Filter / Search Engine
  - i. All documents can be search through filter management (e.g. Date, Subject/ Description, To, From)
  - ii. The system shall have the capability to search the document through Optical Character Recognition (OCR).

   b. User Management
- Easy management of user's information.
- Adopt Role-Based Access Control (RBAC) to authorize system resources allocation to users based on roles.
- System should allow easy administration of all components by the Super User/Admin.
- Add, edit, and delete user and its password.
- Encryption – Passwords must always be stored in an encrypted format in the database. Consultant/Developer must use universally accepted encryption standards that helps protect against the threat of malicious activity by performing real-time encryption and decryption of the database.
- Include up-to-date CAPTCHA program as a remedy to stop spam and other intrusions wherever required.

   c. Workflow Management
- Document Routing
- Assign tasks to multiple users
- Options to add, edit and delete workflow

   d. Back Up Management
- The system shall have the capability to automatically back up and export database and all its documents.

   e. Reports
- The system shall have a filter/search management on what particular reports to print, export and download.

   f. Other Features
- Support for all file types with ability to drag & drop files and folders. (PDF, XLS, DOCX, etc.)

- Ensure compatibility to all the browsers (Mozilla Firefox, internet Explorer, Google Chrome, Opera, Safari).
- Easy to use, intuitive user-experience and responsive web design
- Mobile Friendly
- Download and Print documents (Access restrictions)
- Maintain and ensure that the system supports maximum concurrent users.
- The system should run optimally (page load time below 3 seconds)
- The system should be uploaded in the JHMC website subdomain. (dts.jhmc.com.ph)
- The system should provide audit trails and logs mechanism for content changes performed by system users.
- The system shall notify the users for all activities through email.
- Alert or notify the records management unit all records due for disposition in accordance with JHMC Records Disposition Schedule.
- The system will automatically generate and print Acknowledgment Receipt for all communications incoming.

V.DELIVERABLES, SCHEDULE and PAYMENT

The outputs to be delivered by the consultant includes the following:

DELIVERABLE	DESCRIPTION	TIME (From Contract Signing)	PAYMENT %
Inception Report	Inception report (detailing schedule of work, key staff deployment, methodology, etc.) and Inception Workshop to discuss with JHMC	5 calendar days	15%
Systems Requirement	All key aspects of design (DTS structure, indicators, report formats, information flow, and additional hardware/ software/ data/ connectivity requirements, institutional arrangements, etc.)	5 calendar days	
Development of the DTS	Preliminary design, construction and installation of the prototype	30 calendar days	
	Evaluation and enhancement of the prototype (Iterated development until final product is satisfied)	40 calendar days	25%
	The final system is constructed, based on the final prototype.	30 calendar days	

DELIVERABLE	DESCRIPTION	TIME (From Contract Signing)	PAYMENT %
Project Management and Monitoring System	Piloting Stage: software testing, full data entry and roll-out for selected processes	20 calendar days	15%
	Full Roll-out Stage: deployment of system in full functionality	10 calendar days	
	Post Roll-out: handholding support, proactive use surveys, bug fixes & updates	30 calendar days	15%
Documentation and Training	DTS documentation (design, use, and training manuals, organizational roles, etc.) and workshops	All through the key project stages and for all key deliverable stages – draft and final version	
Final Report	Final overview of activities, review of DTS use, user perspectives, issues, suggestions for improvement, submission of final documents including the system source code and sustainability	5 calendar days	30%
	JHMC Acceptance Report	5 calendar days	
DURATION OF THE PROJECT		**180 calendar days**	**100%**

VI. REPORTING AND OWNERSHIP

1. The draft reports should be submitted to JHMC for review, feedback and recommendations. The final report should have the revision and recommendations incorporated.

2. All deliverables should be in electronic (on CD/DVD – five (5) copies of draft versions and five (5) copies of final versions) and colored hardcopy formats (three (3) copies of the final version). This should include all data, manuals, illustrated training manuals, system source code etc. Workshops should accompany all key draft deliverables to ensure that any comments for improvement can be discussed and agreed in a constructive and interactive manner.

3. The reports will be accepted subject to the approval by the President and Chief Executive Officer (PCEO) upon the recommendation of the ICTD Manager and ASD Manager.

4. JHMC shall be the absolute owner of the software including its source code and have copyright ownership. The consultant shall not replicate or reproduce or use any datasets used for this assignment without the consent of JHMC.

VII. RESPONSIBILITIES OF THE CONSULTANT

1. Design, develop, and deploy a comprehensive computerized and web-enabled DTS for JHMC which is user-friendly and functional.

2. Assume all costs related to its assigned staff, including their salaries, allowances, meals, field accommodations, transportation and logistical support throughout the duration of the contract.

3. Provide training to the users on the management and administration of the system. This is to provide an understanding of the system, its database and infrastructure configurations used during the implementation of the system.

4. Provide a team of experts who are qualified and experienced in both development projects and IT related Fields.

VIII. RESPONSIBILITIES OF JHMC

The JHMC through the ASD-ICT Division shall:

1. Make available all project documents including Project Implementation Plan, Operation's Manual, preparatory studies, present database and other JHMC documents that may be required for the success of the project;

2. Prepare office facilities, telephone, internet, computers, training guides, etc. required for performing installation and commissioning of the DTS;

3. Facilitate participation of project staff in the pre-design workshops and final workshop;

4. Timely review and monitor all stages of the project to ensure that the deliverables of the consultant are made within the agreed timelines;

5. Work in close collaboration with other actors of the project to understand the business detailed specifications and to validate the design of the information system;

6. Participate in the overall design and ensure that the development procedures are respected and implemented *(version control, publication of iterations, bug fixing follow-up, code documentation, etc)*;

7. Assist the consultant's development team in defining the contents and duration of iterations and in managing the deliverables;

8. Ensure the quality of the developments (non-regression, coding standards, respect of the framework, etc.);

9. Run the unit-test and assist the end-users;

10. Conduct full assessment on the developed DTS prior to final acceptance to ensure 100% compliance by the Consultant on the Scope of Works; and

11. Conduct performance evaluation on the Consultant.

IX. QUALIFICATIONS OF THE CONSULTANT AND KEY PERSONNEL

The Consultant shall have expertise in designing, developing and implementation of a computerized and web-enabled information system similar to the project.

The Key personnel to be deployed by the Consultant to perform the works shall meet the following qualifications:

NAME OF POSITION	KEY QUALIFICATION	EXPERIENCE
Team Leader	Knowledgeable and with experience in supervisory and management of software development	At least 2 years
Senior Programmer / Web Developers	Knowledgeable in software development	Involved in at least two (2) similar projects completed.
Documentation Specialist	Knowledgeable in Information System documentation	Involved in at least two (2) similar projects completed.

X. SELECTION OF THE CONSULTANT

The proposal submitted by any interested consultant shall be evaluated using Quality Based Evaluation (QBE). Each consultant shall submit its **technical and financial proposals** simultaneously. The technical proposal shall be given a weight of one hundred percent (100%) and shall be evaluated according to the following criteria:

	EVALUATION CRITERIA	WEIGHT	MINIMUM REQUIRED SCORE
1	Profile of Development Team	50%	40%
	Highest Educational Attainment	10%	
	Highest Certifications or Trainings	20%	
	Project Experiences	40%	

	EVALUATION CRITERIA	WEIGHT	MINIMUM REQUIRED SCORE
	Years of IT Experiences	30%	
2	Track Record of Company	20%	16%
	Years of Operations	30%	
	Similar Combined Projects	70%	
3	Methodology and Workplan	30%	24%
	Quality of Methodology	30%	
	Workplan	30%	
	Staffing Schedule	20%	
	Conformity to the technical specifications	20%	
	TOTAL	**100%**	**80%**

Consultants shall then be ranked in descending order based on the combined numerical ratings of their technical proposals, from which the highest rated bid will be identified.

The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws.

XI. CONTRACT TERM

The Contract shall be for a period of six (6) months and shall remain valid and effective until the full delivery of the requirements and acceptance by JHMC.

XII. WARRANTY

The Consultant warrants that:

1. It is expert in the field and will provide services that are consistent with the highest industry standards.
2. The developed DTS is in conformity with JHMC's specifications and requirements.
3. Without additional cost to JHMC, shall make modifications to the DTS as may be necessary to correct any defects or errors reported to the Consultant by JHMC for a period of one (1) year after the final acceptance date of the completed project.

   Reported defects or errors that needs an immediate attention shall be acted by the Consultant with three (3) working days upon notice by JHMC. If the Consultant is unwilling or unable to make the required modifications then Consultant shall reimburse JHMC's reasonable expenditures for obtaining the required modifications from other Service Providers of JHMC's choice.

4. It will indemnify JHMC against liability to third parties resulting from claims that the information system or software developed infringes on or violates any patents, copyrights, or trade secrets or any JHMC claims, losses, and damages arising from the Consultant's breach of any of its obligations.