



AutoPRO™

**Electronic Document Management System Solution
Implementation Consultant
(EDMSSIC)**



AutoPRO™ Technical Compliance

Project : Electronic Document Management System Solution Implementation Consultant (EDMSSIC)

Client: CROWN PRINCE PRIVATE AFFAIRS, CPPA

AUTOPRO TECH IT CONSULTANCY FZCO



Introductory Statement

This submission responds to Implementation Electronic Document Management System Solution Implementation Consultant for CROWN PRINCE PRIVATE AFFAIRS, CPPA.

We believe that AutoPRO™ Software is eminently qualified to carry out the Electronic Document Management System Solution Implementation Consultant for this project for the following reasons



TECHNICAL COMPLIANCE SHEET

About AutoPRO™

AutoPRO™ is a Web-based document/management information Electronic Document management software system (EDMS) which together enable processes that automate efficient project management, from project design to closeout. Built on Microsoft .Net platform and open Database technology for portability and ease of maintenance, AutoPRO™ delivers robust performance and real-time visibility for managing construction projects and programs. With features including collaboration from any PC at any location, purchasing management, cost control, document management and field administration capabilities. All this and it is fully ARABIC ENABLED. AutoPRO™ can be used on iPhones, iPads and Android Devices, making it an even more advanced tool than its competition.

AutoPRO™ enables Project management Offices (departments) to effectively manage their projects and resources across multiple projects and provide strong team coordination and collaboration through the provision of a built in collaborative Portal that can allow Project Managers to create and manage special Portal sites for each project and add the respective team members to it.

Project Status Dashboard

38 days in delay

Project Delay <

[Click here for More info](#)



15

CCS Activities in Delay



4,282,667

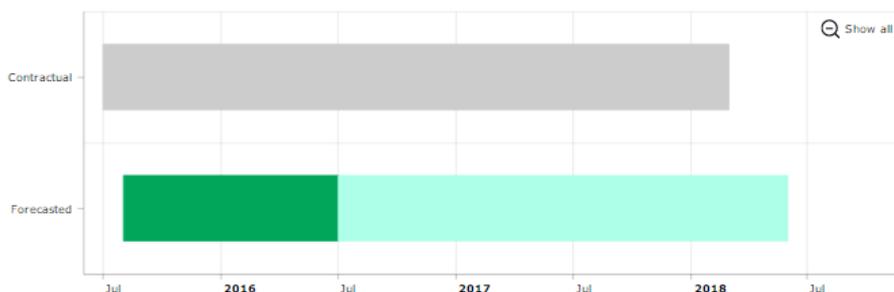
Value claimed by Contractor



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Planning and Time Management

[Click here for Project Schedule](#)



Countdown



634

Days Left!

Exhibit A

Functional Requirement

Respond Code	Description
Y	Yes - Fully, provided "Commercially Off-The-Shelf (COTS)"
N	No - Not Available / Not Supported or in a future release
A	In separate module (s) available at Additional Cost
T	Supported via a third-party solution, please provide a narrative

Req. No.	Requirement	Respond Code	Comments
A. Document Control			
A1. Document Management			
A1.1	The system shall provide an organizational level document register per organization per project (not a single register to all organizations per project)	Y	
A1.2	System architecture shall ensure each organization can only access its data registers within the projects they are invited to. No organization shall be able to access other organizations registers, including System Administrators and Consultant personnel.	Y	
A1.3	System records shall be attributed and managed based on metadata without reference to a folder structure	Y	
A1.4	The system shall allow organizations to manage document access based on metadata values if needed.	Y	
A1.5	The system shall support bulk loading/updating of documents with metadata contained in a spreadsheet without requiring Consultant configuration or local software installation (i.e., Java)	Y	
A1.6	The system shall identify documents for distribution based on previously distributed versions	Y	

Req. No.	Requirement	Respond Code	Comments
A1.7	The system shall be able to automatically register, and update documents received on a transmittal to the document register	Y	
A1.8	The system shall allow every user to configure their organization's Document Register views/fields at a user level to expose additional captured metadata as required by a user without affecting any other users' views of the register. Users shall also be able to export those reports to excel as needed and shall not require Administrator-level support to achieve any of these requirements.	Y	
A1.9	The system shall maintain a chronological organizational Document event log against every activity, including viewing, updating, downloading, superseding, or transmitting.	Y	
A1.10	The system shall support both auto document numbering (according to a user defined structure) and free text document numbering at a document type level	Y	
A1.11	The system shall be able to search the entire metadata set for each document along with document contents for MS Office and OCR'd PDF formats.	Y	
A1.12	The system shall support full Boolean searching within the Document register	Y	
A1.13	The system shall support customized saved searches at the user, organization and project level	Y	
A1.14	The system shall have the ability to search documents by using barcode/QR scanners	Y	
A1.15	The system shall have the ability to automatically update the Document Register based on the outcome of actions taken in the Workflows and Package modules	Y	
A1.16	The system shall provide inherent links between the Workflows and Package related documents.	Y	
A1.17	The system shall support that all documents and transmittals sent to an organization shall be visible and accessible to all members of	Y	

Req. No.	Requirement	Respond Code	Comments
	that organization team unless marked as confidential		
A1.18	The system shall provide transmittal reporting direct from the Document Register providing for both inclusion and exclusion reports exportable from the system	Y	
A1.19	The system shall provide direct links to transmittals, received and sent, from within the document register	Y	
A1.20	The system shall be able to export all metadata related to the documents	Y	
A1.21	The system shall provide the ability to upload multiple files using drag & drop functions	Y	
A1.22	The system shall provide the ability to upload files stored in 3rd Party SaaS file stores such as Dropbox	Y	
A1.23	The system shall provide the ability to create relational links between documents that show how they relate	Y	
A1.24	The system shall provide the ability to create configurable labels to manage relational links between documents to show how they relate/reference each other	Y	
A1.25	The system shall allow distribution of documents to non-system users with no file size limitation or email server limitations	Y	
A1.26	The system shall allow concurrent viewing of the same document by multiple users at the same time	Y	
A1.27	The Platform shall be able to apply spell checking to the attributes	Y	
A2. Document Transmittals			
A2.1	The system must have no file size restriction on documents attached to transmittals while still being capable of transmitting large numbers (hundreds if needed) to any system/project organization	Y	
A2.2	Recipient organizations must have the ability to control whether documents registration is manual or automatic on to the Document Register	Y	

Req. No.	Requirement	Respond Code	Comments
A2.3	The system shall allow organizations to choose to handle transmitted documents to their organization manually and override the automatic registration if needed at a project level.	Y	
A2.4	The system shall allow users to create tender transmittals as and when needed without exposing recipients.	Y	
A2.5	The system shall allow users to mark certain transmittals as confidential, so they are available to sender and recipients' users only.	Y	
A2.6	The system shall allow administrators to mandate any number of fields on the transmittal coversheet (Form)	Y	
A2.7	The system shall be able to provide real-time reports of previously transmitted documents out of an organization and compare and identify any required updates to be transmitted to other organizations.	Y	
A3. Imaging			
A3.1	The system shall support searching contents of scanned OCR'd PDF documents	Y	
A3.2	The system must provide the following mark-up capabilities at least: highlighting, digital stamp, digital signatures, sticky notes, freehand	Y	
A4. Security Requirements			
A4.1	The system shall provide check-in and check-out capabilities for documents	Y	
A4.2	The system shall provide a solution to allow for varying levels of administrator security	Y	
A4.3	The system shall provide secured document registers: No data can be deleted (even by administrators or Consultant), and the system shall create a new version of the document anytime a change takes place to its content or any of its related metadata fields.	Y	
A4.4	The system shall show only the most recent documents revision (by default) unless users	Y	

Req. No.	Requirement	Respond Code	Comments
A4.5	The system shall allow authorized users to mark certain documents as "confidential" and allow them to manage who can access/view this document at the document level.	Y	
A5. Reporting			
A5.1	The system shall enable users to define their reporting metadata and view directly within the document register.	Y	
A5.2	The system shall allow users to save certain search criteria into a virtual folder then run these "saved search criteria" as and when needed without the need to utilize administrator or Consultant personnel.	Y	
A5.3	Administrators shall be able to save searches at the organization level or project level, so search criteria become available to all organization users or project users but shall always run against their accessible documents within their organization document register only.	Y	
B. Communication Management			
B1. Communication Management			
B1.1	The system shall provide a user-friendly interface to design any number of electronic communication forms such as Transmittals, Letters, RFIs, NCRs, and others	Y	
B1.2	The system shall allow administrators to create any number of fields and Field types (free text, number, Yes/No, Single select, etc.) to utilize in the communications Forms.	Y	
B1.3	The system shall allow Administrators to build and configure forms and communication-related workflows without the need to engage Consultant's consultants or must learn system customization or coding.	Y	
B1.4	The system shall allow users to link Forms to documents or other forms when initiating.	Y	

Req. No.	Requirement	Respond Code	Comments
B1.5	The system shall a single comprehensive view of all related communications on a single screen for ease of tracking related historical communications.	Y	
B1.6	The system shall allow for "private" fields to be created and utilized without being visible to other organizations when sending the related forms.	Y	
B1.7	The system shall allow communication forms to be routed based on initiators or based on certain field values and then distribute to pre-defined recipients or groups accordingly.	Y	
B1.8	The system shall not limit the number, or the size of documents attached to any communication Form.	Y	
B1.9	The system must not allow the deletion of correspondences or manipulation of its contents once sent. It shall also provide confirmed delivery once any communication is sent to a system user.	Y	
B1.10	The system shall automatically create a record log of all incoming and outbound communication forms and link related communications even when subject lines or other relevant metadata are changed.	Y	
B1.11	The system may allow organizations to approve or reject specific types of project communications before they leave their organization to avoid mistakes.	Y	
B1.12	When creating a new form-field, the system shall allow administrators to re-use the same field across any number of forms on the project.	Y	
B1.13	The system shall maintain an audit trail of who sent what and when in a configurable communication register.	Y	
B1.14	The system shall allow users to decide what fields they want to see when searching within their organization's communications registers without affecting other users' views and without requiring administrator assistance to do so.	Y	

Req. No.	Requirement	Respond Code	Comments
B1.15	The system shall allow users to save certain search criteria to their folders or share with their organization or project wide users as needed. Sharing the search criteria shall not expose any results but allow other users to run the search queries against their accessible records	Y	
B1.16	The system shall automatically register any sent communication in the sender's "sent" register and the recipients' "Inbox" register with zero manual handlings by either organization	Y	
B1.17	The system shall provide administrators the ability to create and enforce communication distribution groups based on communication type, sender or specific field values, both internally within their organization or across organizations	Y	
B1.18	The system shall allow initiators to mark specific communications as "Confidential," so they are accessible only to sender and recipients. Administrators shall not have access to confidential communications unless addressed to or copied in	Y	
B1.19	The system shall allow users to export selected communications metadata fields related to correspondence items to excel	Y	
B1.20	The system shall provide automatic numbering to all communications on a project level and prevent any correspondence number duplication	Y	
B1.21	The system shall allow users to search for communications via attributes or contents and provide Boolean search capabilities	Y	
B1.22	The system shall allow users to create communications directly through the system web interface (web-based editor) without the need to use installed applications or add-ons	Y	
B1.23	The system shall allow initiators to specify if action, response or review is required by a specific date and mark the communication as "overdue" automatically when a due date has passed without receiving a response	Y	

Req. No.	Requirement	Respond Code	Comments
B1.24	The system shall ensure only communication initiators can mark the communication as "closed-out" when satisfied with the responses they received	Y	
B1.25	Administrators shall be able to mark specific fields as "mandatory" based on each form type. The same field can be mandatory in one form and optional in another form	Y	
B1.26	The system shall allow users to register external communications received through emails or traditional ways (hard copies) as and when needed printer's workflow integration as well.	Y	
B1.27	The system shall automatically update the document related audit log when a document is attached to a communication	Y	
B1.28	The web-based Platform shall be browser encapsulated, meaning if a user opens another web browser session and opens the system in that as well, both sessions shall function independently.	Y	
B1.29	The system shall be able to have functionality for 2D/3D CAD models and support BIM process	Y	
B1.30	The system shall allow to export data, documents, and or links to documents out of the system.	Y	
B1.31	The system shall provide the capability to list, sort and filter functions to provide extensive reporting of all information. Such reports shall be easily configured that includes, at a minimum, at-a-glance dashboards able to export to Excel, CSV and PDF function and the ability to save regular or advance searches.	Y	
B1.32	The system shall offer fully integrated online viewer that allows participants and users to view different file formats without limitation and without additional software. It shall also provide real-time mark-up / annotation / stamping solution. The system shall allow users to search for multiple document types (e.g., text, image, .pdf, word, excel, power point, .msg, .dwg., .dwg, .ifc, .rvt, etc.) in one	Y	

Req. No.	Requirement	Respond Code	Comments
	search with easy page to page navigation between results.		
B1.33	The system shall provide the ability for back-up, restoration, as well as recovery procedures in event of system failure without affecting other projects in the same environment.	Y	
B1.34	The system shall offer a provision for online support for fax-based communication including installation and configuration of an inbound and outbound fax capability.	Y	
B1.35	The system shall offer accessibility support and compliance with audit tools and procedures included with the product(s).	Y	
B1.36	The system shall allow project administrators to create communications routing rules at a project level to force certain communications types when forwarding or responding to a specific communication type.	Y	
B1.37	The system shall allow specific communication distribution rules to be defined and enforced depending on the sender (whether the sender is an individual or a group)	Y	
B1.38	The system shall allow administrators to force specific distribution rules based on certain field values within the communication form.	Y	
B2. Mobility			
B2.1	The system shall provide full communication capability using hand-held smart devices (iOS and Android smartphones and tablets). Ideally, this shall be through fully supported mobile apps and not through using web browsers on these devices.	Y	
B2.2	Mobile apps shall allow users to access, create, and respond to communications in both online and offline modes (i.e., without an internet connection at the time).	Y	
B2.3	Mobile apps shall provide full system communication functionality to allow attaching controlled documents from the system's document register.	Y	

Req. No.	Requirement	Respond Code	Comments
B2.4	The system shall maintain a full audit trail within the communications module related to actions initiated from mobile apps.	Y	
B2.5	Mobile apps shall provide offline capabilities, so a user can respond to, issue a new communication or find previous communications when offline, e.g., in-flight, in remote locations, etc. then synchronize automatically with the live system as soon as the internet connection is restored.	Y	
C. Workflow Management			
C1. Document Management Workflow			
C1.1	The system shall provide workflow (document review/approval) capabilities, with a graphical workflow design interface from within the standard system web interface.	Y	
C1.2	The system shall allow authorized users within each organization to create document review/approval workflows directly through the solution interface without the need to customize or use internal resources to build customization code and without the need to utilize the Consultant's consultant/ resources	Y	
C1.3	The system may provide a graphical workflow designer with drag-n-drop functionality and ability to define step assignees and durations	Y	
C1.4	The system shall allow administrators to enable or disable workflow initiator to reassign steps, change durations or skip steps at a workflow level and based on business needs	Y	
C1.5	The system shall allow Cross-Organizational workflows to be created and allow each step assignee to initiate sub workflow (if needed) to distribute work without exposing the sub-workflow to any parent workflow steps assignees or organizations	Y	
C1.6	The system shall allow workflow participants to report on the workflow progress even if they haven't received their step yet, allowing forecasting of upcoming workload	Y	

Req. No.	Requirement	Respond Code	Comments
C1.7	Standard workflow report shall allow organizations to identify bottlenecks and delays with full transparency	Y	
C1.8	Workflows participants shall have the ability to reassign actions within their organizations and delegate actions as needed without the need to ask system administrators to do so	Y	
C1.9	The system shall allow users to generate reports on Workflows progress and export to MS Excel	Y	
C1.10	The system shall provide reporting and project/program dashboard capabilities that show the organization's and users completed / pending actions in workflow activities	Y	
C1.11	The System shall provide Digital Signature functionality.	Y	
C1.12	The system shall allow attaching multiple documents to the same workflow. It shall also allow assignees to either complete their review in batches or as a complete set	Y	
C1.13	Workflow participants shall be able to review PDF documents using a built-in viewer and comments, consolidate comments or stamp documents as needed and without the need to use any plug-ins or to have Java installed on their devices	Y	
C1.14	Workflow participants shall be able to replace documents, as defined in the template, or attach additional reference / supporting documents as needed	Y	
C1.15	Workflow template creator shall be able to create parallel steps and define whether all parallel steps shall be actioned or some, one, etc. as needed	Y	
C1.16	When documents are in a workflow review, the system shall automatically lock those documents in the organization's document register so no one can update (supersede) those documents outside of the workflow review until completed or terminated	Y	

Req. No.	Requirement	Respond Code	Comments
C1.17	Users shall be able to view documents directly from their document registers even when in a review process, however, the system shall mark those documents, so users know they are being reviewed	Y	
C1.18	The system shall maintain a full audit trail of all documents activities during the review	Y	
C1.19	The system shall allow supplementary files to be included in workflows steps to support the review process	Y	
C1.20	The system shall allow administrators to configure workflow review outcomes at the project level and assign them to organizations for use when creating workflow templates	Y	
C1.21	The Workflow template designer shall allow the creation of unlimited steps in both parallel and serial orders	Y	
C1.22	The Workflow template designer shall allow administrators to decide whether rejecting a step shall result in returning documents to the initiator or proceeding to the next review step.	Y	
C1.23	The system shall notify assignees once their step becomes active.	Y	
C1.24	The system shall notify step participants and workflow initiators when a step is overdue.	Y	
C1.25	The system shall provide notification after the workflow that includes the documents and a review summary and optionally allow the inclusion of users not included in the Workflow Review	Y	
C1.26	The system shall automatically update the Document Register of all participating organizations at their step and the outcome of the Workflow with the review outcome and marked-up documentation	Y	
C1.27	The system may provide the functionality to add comments within the review task that can be searched, reported and exported to create comment sheets and comments registers per document	Y	

Req. No.	Requirement	Respond Code	Comments
C1.28	The system shall provide the functionality to consolidate all mark-ups created within the online viewer, and any external PDF based viewing and mark-up tool, into a single marked-up document based on the workflow template configuration	Y	
C1.29	The system shall provide the capability for the use of customized stamps, drag and drop onto the document when reviewing documents.	Y	
C1.30	The system shall provide graphical design Progress reporting to all workflow participating organizations.	Y	
C1.31	The system shall allow tracking and reporting on bottlenecks and delays at a step level or the overall review process.	Y	
C1.32	The system shall allow lead-reviewers to consolidate comments and mark-ups as required before they are shared with other organizations. Both mark-up layers (before and after consolidation) shall be available for historical reporting and interrogation.	Y	
C1.33	The system shall allow process designers to decide whether final status is driven by final reviewer status or least of all reviewers' statuses.	Y	
C1-34	The system shall allow reviewers to report on workload related to their organizations as soon as a review process has been kicked off without the need to wait until their organization has received the documents for review.	Y	
D. Package Management			
D1. Packages			
D1.1	The system shall allow users to define a set of documents and apply additional metadata as a Package.	Y	
D1.2	The system shall allow users to define different Package types, allowing configuration of the metadata captured per Package Type.	Y	

Req. No.	Requirement	Respond Code	Comments
D1.3	The system shall allow users to find and view packages and click through to the underlying documents	Y	
D1.4	The system shall allow users to view the packages a document belongs to and click through to the Package	Y	
D1.5	The system shall allow the management of packages by explicit administrators.	Y	
D1.6	The system shall allow the editing of packages by select users across the project.	Y	
D1.7	The system shall allow the distribution via transmittal of the Package to other organizations participating in the project.	Y	
D1.8	The system shall show the user when a package contains documents that are not at the current version.	Y	
D1.9	The system shall visually show the user what is different between a document in a package, and the current version in the document register.	Y	
D1.10	The system shall allow an administrator or editor to update the package to the latest current documents.	Y	
D1.11	The system shall allow the management of the distribution list for a package on a per-package level.	Y	
D1.12	The system shall allow the configuration of Package Types as document-only packages or a collection of Documents and Mail	Y	
D1.13	The system shall allow a review process on the Package.	Y	
D1.14	The system shall capture and display when a document has been added to a package.	Y	
D1.15	The system shall capture and display when a document has been updated in a package.	Y	
D1.16	The system shall capture and display when a document has been removed from a package.	Y	

Req. No.	Requirement	Respond Code	Comments
D2. Work Packages			
D2.1	The system shall allow the Work Package to be managed so that a Package cannot be closed if there is open correspondence.	Y	
D2.2	The system shall allow for the management of the life cycle of the package.	Y	
D2.3	The system shall provide a hyperlink to the package from the correspondence generated from the package	Y	
E. Model Management			
E1. Model Management			
E1.1	The system shall provide a true Common Data Environment (CDE) to facilitate BIM process (Model management) to comply with standards like BS/PAS1192, NATSPEC and NBIMS-US	Y	
E1.2	The system shall allow publishing into the system directly from 3D authoring software	Y	
E1.3	The system shall support and allow for data interoperability through IFC, BCF, and COBie	Y	
E1.4	The system shall allow the project team across organizations to access and collaborate on the models without the need to install or purchase any additional software.	Y	
E1.5	The system shall allow users to assign model related tasks and track progress through imports and exports of BCF files	Y	
E1.6	Users shall be able to view models and perform standard actions such as a walkthrough, attach object-related documents from the document register, initiate object-related communications forms, merge various models stacks directly from within the viewer, access objects properties, create sections and viewpoints as needed without the need of additional software or plug-ins / Java etc.	Y	
E1.7	The system shall allow collaborators to raise any communications forms (RFI or design query, etc.) from within the model, directing the recipient to the exact issue location and viewpoint for a quick resolution.	Y	

Req. No.	Requirement	Respond Code	Comments
E1.8	The system shall enable the design team to import clashes to the system, assign relevant tasks to users, and track progress with a full record of any comments related to any issue.	Y	
E1.9	The system shall allow organizations to collaborate to deliver a complete asset model to The asset owner With linked documentation, communications forms, and other relevant asset data for operations and maintenance.	Y	
E1.10	The system shall allow users to access the models on their tablets in both online and offline modes, to perform walkthroughs, orbit, view specific objects properties, and be able to access related documents directly from the model mobile viewer.	Y	
E1.11	The system shall provide a minimum of 1GB aggregated online viewing capability	Y	
E1.12	The system Shall support the Open BIM formats such as IFC, COBie, and BCF	Y	
E1.13	The system shall allow users to merge different model stacks directly from within the system (both through a web interface and mobile app).	Y	
E1.14	The system shall provide access to organizations to aggregate models that they have access to	Y	
E1.15	The system shall allow model administrators to manage the security of each model set, dependent on the BIM execution protocol	Y	
E1.16	The system shall support COBIE files export/import	Y	
E1.17	The system shall provide authoring tools to allow design teams to publish models from their authoring tools directly to the system	Y	
E1.18	The system shall provide mobile-specific (non-browser based) access to the model	Y	
E1.19	The system shall provide mobile-specific (non-browser based) ability to view/reference documentation from the Document Register	Y	

Req. No.	Requirement	Response Code	Comments
E1.20	The system shall allow sectioning and walkthrough functionality of the model through both web interface and mobile apps.	Y	
E1.21	The system shall provide integration between the models and the Document Register to control organization access and ability to review and comment on the model through workflow (review) management		
E1.22	The system shall allow users to a group and sort models including creating viewpoints that can be shared internally or externally for cross-organizational use	Y	
E1.23	The system shall have built-in integration with common BIM tools such as Revit, Navisworks, and Solibri	Y	
F. Inspection and Quality Management			
F1. Inspection and Quality			
F1.1	The system shall provide mobile-specific (non-browser based) site activity application (for iOS and Android devices) to capture Defects/Safety Issues and manage Checklists/Quality inspections	Y	
F1.2	The system shall, from within the mobile app, allow a user to create issues, include photographs with ability to annotate, assign issues to appropriate respondent at organization and user-level including tracking comments back and forth relating to the issue closeout	Y	
F1.3	The system shall allow for unlimited users with the ability to receive and update assigned issues.	Y	
F1.4	The system shall allow an inspector to control work as done as well as distribute reports including thumbnail images for issue management	Y	
F1.5	The system shall provide the ability to complete checklists and capture issues while offline	Y	
F1.6	The system shall provide administrators the ability to configure additional fields per issue type to capture additional reportable metadata	Y	

Req. No.	Requirement	Respond Code	Comments
F1.7	The system shall have the ability to capture and update Issues in offline mode with automatic sync capability when back online	Y	
F1.8	The system shall allow inspectors to manage all project site inspections on one system, including ad-hoc and structured inspections, with fully customizable checklist templates to manage nonconformance issues.	Y	
F1.9	The system shall allow inspectors, based on the system configurations, to create unlimited types of issues and collect the relevant data to each issue type based on business requirements in both online and offline modes.	Y	
F1.10	The system shall allow inspectors to manage checklists (structured inspections) and comment, attach photos, and create issues relating to each line item on their checklist in both online and offline modes.	Y	
F1.11	The system shall have the ability to import checklists/forms and allow for photographs, mark-ups and wet signatures to be applied	Y	
F1.12	The system shall allow real-time tracking of issues and statuses and provide accurate reporting on both project and portfolio levels.	Y	
F1.13	The system shall automatically sync data captured while offline and following restoration of an internet connection.	Y	
F1.14	The system shall provide the ability to self-configure project-specific Checklists without the need to write code or use Consultant's personnel / professional services	Y	
F1.15	The system shall allow capture of photographic evidence for a Checklist or issue/defect item	Y	
F1.16	The system shall allow organizations to share issues and checklists with other organizations if needed.	Y	

Req. No.	Requirement	Respond Code	Comments
G. Tender Management			
G1. Tender Management			
G1.1	The system shall provide a specific tendering management module fully integrated with main system areas (directories, documents, communications, etc.)	Y	
G1.2	The system shall manage vendor information, including company information, contact details and other information related to sourcing and qualifying vendors, receiving forms, queries and quotations and shall have the capacity to allow for customized Pre-Qualification Questionnaire (PQQ) criteria, scoring, categorization and ranking	Y	
G1.3	The system shall allow to develop a vendor performance evaluation platform, that shall allow the client to electronically (individually and collectively) evaluate its operating vendors performance, may they be (service providers, suppliers, contractors, consultants, etc.)	Y	
G1.4	The system shall allow inviting both system and non-system users to participate in tenders	Y	
G1.5	The system shall ensure invitees are not disclosed to each other throughout the tender process	Y	
G1.6	The system shall provide the ability to validate that all invited parties have received the tender information and track whether they have viewed, accepted or declined the tender invitation	Y	
G1.7	The system shall provide a complete record of all information exchanged to help to prevent disputes and litigation shall they arise	Y	
G1.8	The system shall allow administrators to easily manage multiple bids and tenders from the one interface, with visibility and tracking throughout the tendering process	Y	
G1.9	The system shall allow administrators to decide whether the submission of responses via the system is allowed or not at each tender level	Y	

Req. No.	Requirement	Respond Code	Comments
G1.10	The system shall track which tender recipients have viewed the invitation and be notified when responses are submitted (when system submission is enabled)	Y	
G1.11	The system shall manage tenders related communication confidentially, with a securely recorded audit trail of each bid or tender.	Y	
G1.12	The system shall provide the ability to apply an electronic 'lockbox' at the tender level to ensure meeting compliance requirements. The "lockbox" is to prevent viewing of submissions before reaching the 'Close Date' even if submissions are made prior.	Y	
G1.13	The system shall allow invited tenderers (system and non-system users) to raise Tender RFIs or queries from within the system.	Y	
G1.14	The system shall provide the ability to respond to Tender RFIs individually if needed or issue Addenda to tenderers while tracking all versions of the tender	Y	
G1.15	The system shall allow for the option to block submissions after the tender close date	Y	
G1.16	The system shall have no file size limits or restrictions to both system and non-system users	Y	
G1.17	The system shall allow a Virtual Bid Opening Committee to evaluate the bid submissions status and compliance to ITT (Instructions to Tenderers) , it shall also allow to establish a virtual Technical Evaluation Committee and allow the technical committee members to conduct the technical evaluation of the bids and collectively determine the technical score of the bidders.	Y	
G1.18	The system shall allow to customize a weighted score technical evaluation criteria that shall be used to evaluate the bidders' technical submission against.	Y	

Req. No.	Requirement	Respond Code	Comments
H. Consultant Management			
H1. Supplier Documents			
H1.1	The system shall have the ability to manage Consultant documents in an automated way	Y	
H1.2	The system shall allow the creation of different packages against individual suppliers (or own organization) and assign manager(s) per package	Y	
H1.3	Package Manager(s) shall be able to define the list of documents required from each supplier for a given contract/package, setup default turnaround time for both supplier and recipient to review and define when each document delivery is due	Y	
H1.4	The system shall allow for placeholders to be created by the requester (documents without actual files attached) that carry out required metadata including document type, discipline, asset reference, status, due date, and revision	Y	
H1.5	Once the package has been set up, the system shall allow package manager(s) to issue, all or some of the documents, to the supplier/Consultant requesting submission. Placeholders of documents will automatically get registered in the supplier's organization document register	Y	
H1.6	After a package has been created or issued, the system shall allow administrators to add more documents, mark specific documents as "Submission is no longer required" or remove documents from packages as per project needs.	Y	
H1.7	The system shall allow suppliers to "Submit for approval" once documents are produced according to the scheduled dates	Y	
H1.8	Upon receipt of submitted documents, the user shall be able to review or trigger a multi-party review via controlled workflow optionally.	Y	

Req. No.	Requirement	Respond Code	Comments
H1.9	Once package documents have been reviewed and given a review status, the system shall allow the package manager(s) to respond to the supplier. The process then ends for documents deemed "approved" while remaining documents, if any, go through the review process again until approved	Y	
H1.10	The system shall allow both parties (requesting and supplying organizations) to track the progress of the documents in the package and across multiple packages throughout the whole process	Y	
H1.11	The system shall enable both package manager(s) and Consultant organizations to run reports on what status package/documents have, who they are with and which documents are overdue or not issued for submission yet.	Y	
H1.12	The system shall provide the capability to report graphically on each package % completed and allow drilling down to the documents level status as needed. Reports shall display the status of submissions, completed submissions and which party is overdue	Y	
H1.13	The system shall allow administrators to define which review statuses will mark a document submission as "completed." This will indicate to the supplier that no more versions of the document are required	Y	
H2. Automation			
H2.1	Automated due dates & statuses - When documents are received from suppliers, the system shall automatically update the status report and shall automatically calculate the due dates of when each document must be returned	Y	
H2.2	The system shall allow administrators to pre-configure transmittals to include user(s), the reason for the issue, and subject lines. Configuration controls distribution to enable	Y	

Req. No.	Requirement	Respond Code	Comments
	accurate tracking in the package and package reporting		
H2.3	The system shall ensure integration with core modules within the system. There shall be no double handling of information (metadata) to other parts of the system. The Document Register, Workflow (Review) register, and Communication Register shall be automatically updated, including audit logs, dates, statuses, and other tracking data.	Y	
H3. Tracking			
H3.1	The system shall ensure reports are always updated in real-time with manual input kept to a minimum	Y	
H3.2	The system shall allow users to search and report across individual and multiple packages from a single register	Y	
H3.3	The system shall allow users to run and configure various reports including a report on all outstanding documents from a single supplier, all overdue documents across several key packages and all documents due from a supplier in the next X days	Y	
H3.4	The system shall allow the use of detailed 'Submission History' view to see the detailed history of a document including the 'actual in' and 'actual out' dates, statuses, etc. as needed	Y	
H3.5	The system shall allow real-time progress reports of documents in a package to be presented graphically	Y	
H3.6	The system shall allow package managers to identify where documents are, who is holding up the progress of a package and run similar reports across packages	Y	
H3.7	The system shall maintain an audit trail against each document of any package to track changes and activities against that document.	Y	
H3.8	The system shall allow users to create reports with all desired metadata that can be shared with others in the organization	Y	

Req. No.	Requirement	Respond Code	Comments
I. Integration			
I1. General			
I1.1	The system shall have a Software Developer Kit (SDK) fully documenting the Application Program Interface (API) capabilities and functionalities.	Y	
I1.2	Access to system APIs must require authentication and shall be managed at a user level.	Y	
I1.3	All transactions taking place through the use of APIs must be encrypted over HTTPS, and the security checks that apply to the user interface also apply to APIs.	Y	
I1.4	The system APIs shall allow performing searches for users, projects and documents, to register, supersede and transmit documents, and to search, generate, send and read communications forms at a minimum level	Y	
I1.5	The system's APIs web services shall be designed to be a programming language and platform-independent and use a RESTful implementation with common standards such as HTTPS, URL, and XML	Y	
I1.6	APIs must support complete data extraction, including documents, communications, schemas, and users, etc.	Y	
I1.7	The system shall provide pre-built integration between its cost control module and Primavera P6 allowing seamless synchronization when needed	Y	
I1.8	The system shall have the capability to integrate ERP Dynamic 365 as well as the capabilities to support Single-Sign-On SSO, SAML/OAUTH, NT domain accounts, or active dictionary-based authentication and security-related details.	Y	
I1.9	The system shall be integrated with client classification application such as Microsoft Azure Information Protection, Titus or other Data Classification tool.	Y	

Req. No.	Requirement	Respond Code	Comments
J. Data Security, Integrity & Access			
J1. Security			
J1.1	The provider, or it's delivery partner shall provide primary and secondary/failover instances. The system shall be delivered on-Premises based on CPPA requirements.	Y	
J1.2	The system shall be ISO 27001 and SSAE 16 SOC 2 certified/compliant	Y	
J1.3	The system shall not require users to install local software on their devices (e.g., Active X or Java) to perform any online administrative or end-user activity, including bulk uploading/downloading of documents, viewing, and marking-up of documents and drawings, viewing and interacting with BIM models, etc.	Y	
J1.4	The system shall enforce encryption on all public facing access points and sites (encryption in transit as a minimum)	Y	
J1.5	The system must not store user passwords or make them accessible to administrators or Consultant personnel.	Y	
J1.6	The system may support the Identity Federation (SAML v2, oAuth, ws-federate, etc.)	A	
J1.7	Thesystemshallsupport2-factor authentications at a minimum through a web interface, Outlook integration, and mobile apps.	Y	
J1.8	The system shall grant access to all included functionality through a single login per user to all projects.	Y	
J1.9	The system shall allow administrators to enforce users' credentials strength and change/update frequency.	Y	
J1.10	The system may provide the ability to create a local copy (local network accessible) of the system data (shall any organization require that) by automatically capturing and producing an incremental system archive of the organization's data (including all documents, communications, and relevant audit trails).	Y	

Req. No.	Requirement	Respond Code	Comments
J2. Data Integrity			
J2.1	The system shall not allow record manipulation (even by administrators or Consultant personnel) once a record is created/registered without a full audit trail and recovery capability	Y	
J2.3	The system must maintain an audit trail of all versions of a document. This audit trail shall include all the version metadata, e.g., revisions history, user access including dates/time, and links to transmittals or workflows used for distribution.	Y	
J3. Data Access			
J3.1	The system must not allow any organization (including Consultant's organization) to access another organization's data except for publicly owned, shared, or specifically transmitted, data	Y	
J3.2	The system shall have no limits to the number or size of documents, mail, workflows, packages, the file size of records created, stored, downloaded or uploaded to the system, including models.	Y	
J3.3	The system shall not have any limitations to types files or sizes of files, individually or collectively, stored on the system	Y	
J3.4	Organization administrators shall be able to optionally restrict access, from within the register, to documents, document types (and optionally other metadata) to users or user groups from within their organization	Y	
J3.5	Organization administrators shall be able to optionally restrict access to a user only to have access to communication forms that they create or receive.	Y	
J3.6	The system administrators shall be able to optionally restrict access to selected organizations to only communicate with other organizations to transfer documents and communication forms	Y	
J3.7	The system shall provide granular access to different users with different roles.	Y	

Req. No.	Requirement	Respond Code	Comments
J3.8	The system shall assign different roles to different users based on project/organization structure.	Y	
J3.9	The system shall assign roles that are granted permissions based on the principle of most privilege.	Y	
K. The System Administration & User Management			
K1. The System Administration			
K1.1	The system shall support multiple Project types configurations	Y	
K1.2	The system shall provide a Common Data Environment (CDE) that complies with BIM standards such as BS/PAS1192, NATSPEC and NBIMS-US, with integration to Document Management and Communication Forms	Y	
K1.3	The system's functionality and administration shall be available through one interface to all users.	Y	
K1.4	The system shall provide a multilingual interface for ease of utilization by project partners and participants (Arabic and English are required as a minimum)	Y	
K1.5	The system shall support any browser's current and N-1 versions (Microsoft Edge, Firefox and Chrome as a minimum)	Y	
K1.6	The system must provide 24/7 online knowledge base and training videos for self-conducted training sessions	Y	
K1.7	The Consultant's Support desk shall be available on a 24/7/365 basis through email and local contact numbers.	Y	
K1.8	The system shall grant that only The Client administrators have the right to control project configurations unless this right is novated to another organization at a project level.	Y	
K1.9	No installed plug-ins or Java shall be required by any user to use the system. All functionality shall be available directly through a standard installed browser without having to install additional components.	Y	

Req. No.	Requirement	Respond Code	Comments
K1.10	The system shall allow each organization to administer access and permissions for its users through the creation and management of roles	Y	
K1.11	The system shall allow the project administrators to create and manage roles to control all organization ability to create types of documents, assign statuses and create communications forms within the system amongst other permissions	Y	
K2. User Management			
K2.1	The system shall support the user's notifications via the system and emails. Notifications shall be configurable by administrators but allow users optionally to override their personal preferences as needed without involving Administrators	Y	
K2.2	The system shall automatically create a project directory for each project and add organizations and users as they get invited or added to the project. Users and organizations shall not need to manually maintain their own contacts list to communicate with other project participants.	Y	
K2.3	Each user shall be able to access all projects they have been invited to through a single username and password.	Y	
K2.4	The system shall provide users a personal space, including a personal dashboard, to access all actions assigned to them at a project or all projects levels, where they are already invited or added to	Y	
K2.5	The system shall allow administrators or others who are granted access to do so to create "Guest" users; those external users who do not/will not have access to the system via a login, however, require access to only those documents and communications forms shared with them. All guest communications shall be recorded in the audit trail and allow guest users to respond to maintain linking within the system for the system user.	Y	

Req. No.	Requirement	Respond Code	Comments
L. Platform Record Management			
L.1	The Platform shall have the ability to trigger a notification to Document/Record Manager(s) at the end of record retention period.	Y	
L.2	The Platform shall populate the retention period automatically, based on the selected attribute data.	Y	
L.3	The Platform shall capture and manage social media, audio and video records	Y	
L.4	The Platform shall alert user to any failure to successfully capture a record or any other operations around records.	Y	
L.5	The Platform shall be able to protect records against intentional or accidental alteration during the process of capture.	Y	
L.6	The Platform shall be able to protect records against intentional or accidental alteration of their content throughout their life.	Y	
L.7	The Platform shall have records retention and disposition functionalities ensuring government, legal, regulatory and industry compliance.	Y	
L.8	The Platform shall provide control of the generation, authorization, protection, use, organization, integration, sharing and storage of records.	Y	
L.9	The Platform shall be capable of applying the CPPA retention policies automatically, based on the selected document type.	Y	
L.10	The Platform shall provide ability to maintain evidence of business activities and transactions.	Y	
L.11	The Platform shall allow metadata for all records to be viewed by users, subject to access rights of individual.	Y	
L.12	The Platform shall allow a super user to alter the metadata of a record within the system if required, to allow correction of the records profile.	Y	

Req. No.	Requirement	Respond Code	Comments
L.13	The Platform shall support bulk update of disposition dates attribute based on project closeout date.	Y	
L.14	The Platform shall have ability to bulk update preservation holds information and associated retention policies. The Platform shall have metadata to track and report on preservation holds and release of those holds for any given record set, and bulk load project hold information.	Y	
L.15	The Platform shall support destruction process, when authorized users will be able to destroy records eligible for destruction (all versions).	Y	
L.16	The Platform shall be able to support process of identification, preservation, collection, processing, review, analysis and production of records.	Y	
L.17	The Platform must have an ability to track retrievals, returns, destruction of the hardcopy records to and from the external archival storage provider(s).	Y	
L.18	The Platform shall have the capability to manage and track bar codes of hard copy records in storage warehouses.	Y	
L.19	The Platform shall support version control e.g., if we have to keep several versions of a record, Platform must have the capability of supporting that as one record with versions.	Y	
L.20	The Platform shall allow a compound document to be captured as a single record e.g., an Email that has attachments.	Y	
L.21	The Platform shall be able to support the First Party's record classification schemes.	Y	
L.22	The Platform shall be able to maintain audit trails and logs for all record management processes.	Y	
L.23	The Platform shall have the capability of calculating the record disposition dates based on a date value and retention policy.	Y	



TECHNICAL COMPLIANCE SHEET

The following diagram shows in detail the implementation methodology used for the execution of the project of this scale.

AutoPro Implementation Methodology

