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Enterprise Document Management System

Welcome to the Pre-Bid Meeting
07th Dec, 2016

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Upgradation of the Enterprise Document Management System (EDMS)

Request for Proposal

Ref: CO/IT/EDMS/2016-17/RFP

Dated:12/11/2016

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Presentation Outline

- ❖ Background to RFP
- ❖ Timelines
- ❖ Organizational Structure
- ❖ Overview of the ongoing EDMS Project
- ❖ Checklist
- ❖ Expectations

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Background to RFP

- ❖ Existing contract is in the Extension Period
- ❖ Data Repository is already in place
- ❖ Implementation of Workflow Systems
- ❖ Enhancement of Services
- ❖ Additional features
- ❖ Latest Technologies

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Timelines

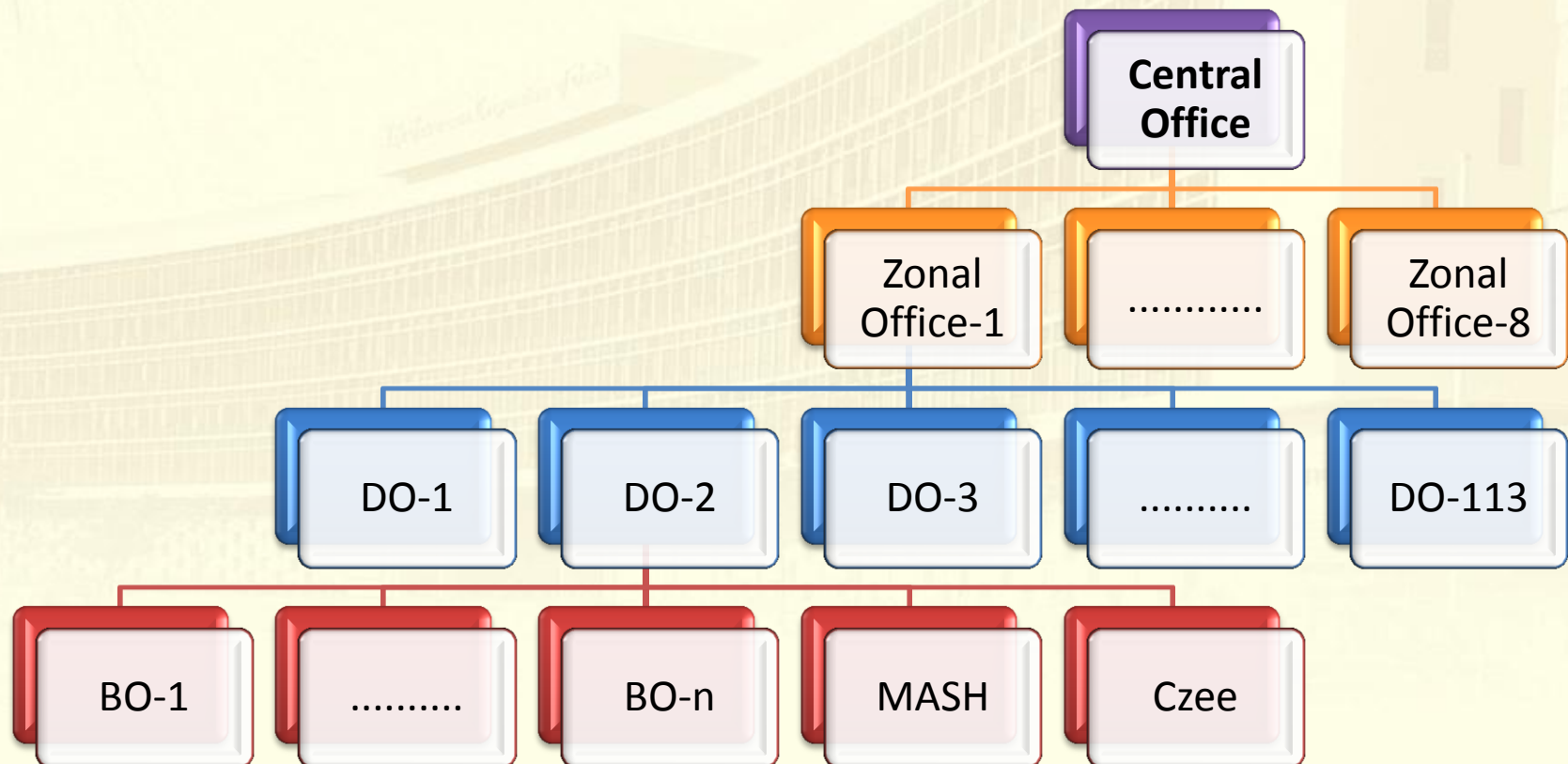
- ❖ **Pre-Bid Query Responses & Corrigenda if any**
 - ❖ 21st Dec 2016
- ❖ **Last date for submission of Bid**
 - ❖ 20th Jan 2017 1530 hrs. IST
- ❖ **Bid Opening**
 - ❖ 20th Jan 2017 1600 hrs. IST
- ❖ **Evaluation by LIC**
 - ❖ Feb 2017
- ❖ **Presentations by the Bidders**
 - ❖ Feb 2017 – (Tentative)

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Organizational Structure

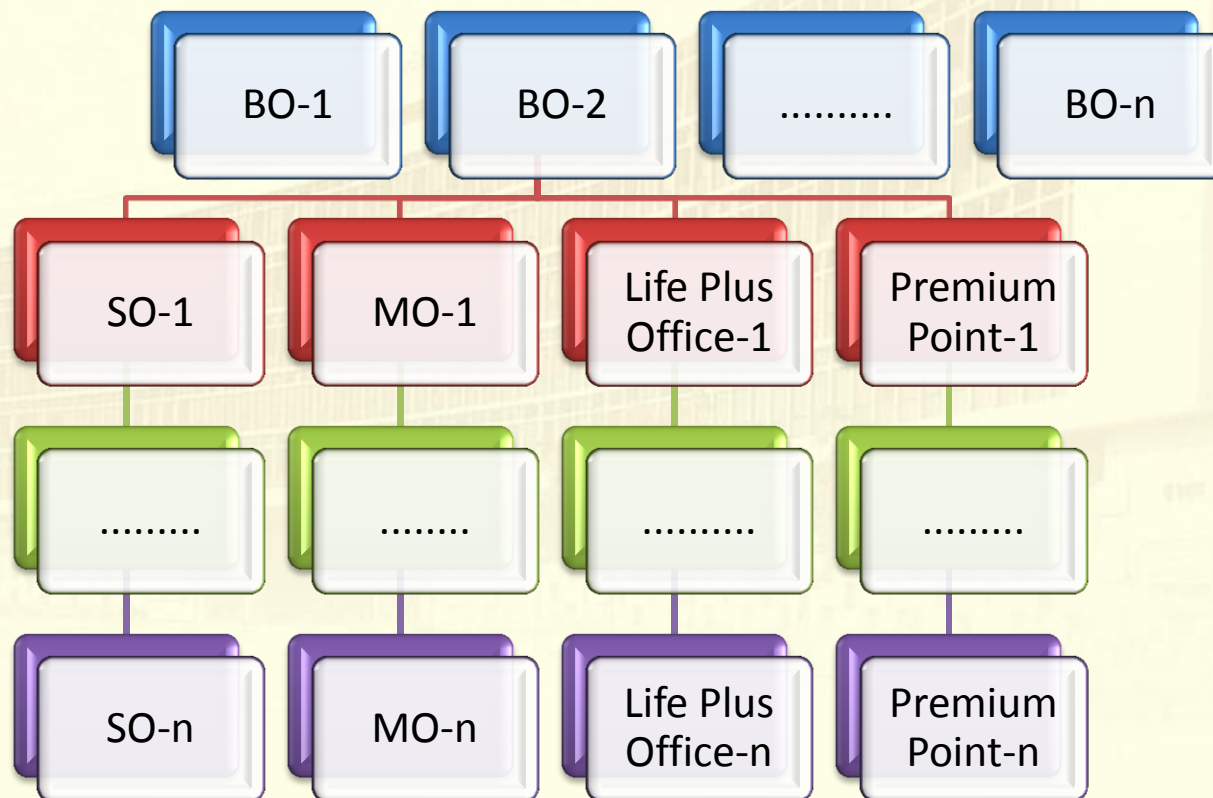


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Organizational Structure



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Overview of the ongoing EDMS Project

- ❖ Synopsis of the existing EDMS Project
- ❖ Implementation of the existing EDMS Project
- ❖ Project Statistics & Volumes
- ❖ Existing Work flow Status
- ❖ Main components of the existing EDMS Project

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Overview of the ongoing EDMS Project

- ❖ Existing Scanning Centres
- ❖ Existing Hardware / Software / Architecture / Network Bandwidth
- ❖ Integration with the Core Business Application
- ❖ Areas in focus

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Synopsis of the existing EDMS Project

- ❖ System Integrator (SI) – M/s Hewlett Packard India Sales (P) Ltd. (i.e. M/s HP), now M/s HPE India Pvt Ltd
- ❖ Software Partner of SI – M/s Newgen Software Technologies Ltd
- ❖ Scanning & Logistics Partners – Multiple – Approved By LIC
- ❖ Contract Period – 8 years and extended for 2 years
- ❖ Extension period ending on 23/2/ 2017

Implementation of the existing EDMS Project

- ❖ The Project was Implemented in three phases
 - ❖ Digitization of the current records – Policy dockets, Incremental documents and Agency dockets
 - ❖ Digitization of the historical data – Policy dockets, Circulars, Manuals, Documents etc. pertaining to DO / ZO / CO departments
 - ❖ Initiation of a limited Workflow System - DAK Work Flow System and Approval Work Flow System
 - ❖ Later in 2009-10 an independent work flow system for New Business Underwriting was implemented.

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Project Volumes (Figures in Crores)

S.No	Particulars as on 05-12-2016	Completed Volume	Total images
1	Policy Dockets	47.74	955
2	Incremental Documents	17.80	107
3	Agency Dockets	0.16	3

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Project Volumes (Financial Year wise)

(Figures in Crores)

Financial Year	Scanned volume (Regular Policy)	No. of images	Scanned volume (Increment)	No. of Images
2007-2008	0.50	9.94	Nil	Nil
2008-2009	8.90	178.09	Nil	Nil
2009-2010	13.04	260.88	0.84	5.04
2010-2011	8.61	172.22	0.45	2.73
2011-2012	3.88	77.55	1.62	9.70
2012-2013	2.87	57.31	2.14	12.86
2013-2014	2.67	53.45	3.06	18.36
2014-2015	3.10	62.05	2.93	17.61
2015-2016	2.96	59.24	4.27	25.62
2016-2017	1.21	24.20	2.49	14.94
Total	47.74	954.93	17.80	106.86

Existing Work Flow Status

❖ EDMS System

- In Chairman, MDs and Board Secretariats, EDMS DAK Work flow is implemented
- In CO / ZO departments, customized General Administration Files Work Flow System (approvals) is in place
- In CO / ZO departments, archival of historical data is in progress

❖ Propsino Pearl

- Independent work flow system for New Business Underwriting.

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Main components of the existing EDMS Project

- ❖ Logistics from Branches/Divisions to Scanning Centre
- ❖ Digitization, Indexing at Scanning Centres
- ❖ Logistics from Scanning Centres to Remote Management Facility (RMF)
- ❖ DVD Upload at DO / BO EDMS Servers
- ❖ Maintenance and monitoring of EDMS Servers

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Main components of the existing EDMS Project

- ❖ Customization of the Scanning Software
- ❖ Customization of the EDMS Software
- ❖ Onsite / Offsite support
- ❖ Help Desk Support & Troubleshooting
- ❖ Periodical MIS
- ❖ Centralized Portal
- ❖ E-learning

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Existing Scanning Centres

Zone	Zonal Headquarter	Number of Scanning Centres for the Zone at different locations
CZ	Bhopal	7
ECZ	Patna	8
EZ	Kolkata	12
NCZ	Kanpur	12
NZ	New Delhi	16
SCZ	Hyderabad	17
SZ	Chennai	12
WZ	Mumbai	22
Total		106*

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Existing Hardware

❖ Central Office Servers

- Admin File Live Server & Replica Server
- Master Index Live Server & Replica Server

❖ Zonal Office Servers

- Admin File Live Server & Replica Server

❖ CO / ZO Servers

- Admin Work Flow

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Existing Hardware

❖ Divisional Office Servers

- Image data and DB data of all Branches under the DO

❖ Branch Office Servers

- Image data and DB data of the Branch

❖ DO / BO Servers caters to Policy Servicing

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Existing EDMS Software

- ❖ Operating System :Linux RHEL 4.4
- ❖ Software :OmniDocs base
version 3.5.4
 - (Totally Customized for LIC)
- ❖ Database :PostgreSQL7.3
- ❖ Architecture :32 Bit

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Existing Architecture

- ❖ Existing Branch EDMS Servers
- ❖ Existing Architecture – BO / DO
- ❖ Existing EDMS Components at
BO / DO

Existing Branch EDMS Servers

❖ Branches are classified into three types :

- Small for servicing < 1,00,000 policies
- Medium for servicing < 2,00,000 policies
- Large for servicing > 2,00,000 policies

❖ Hardware Sizing (500 GB per Hard disk)

- Small – 3 Hard disks with RAID 1
- Medium – 4 Hard disks with RAID 1
- Large – 6 Hard disks with RAID 1

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Existing Architecture – B0 / D0

Components

EDMS Server

Application Server (JTS)

Web Server (TOMCAT)

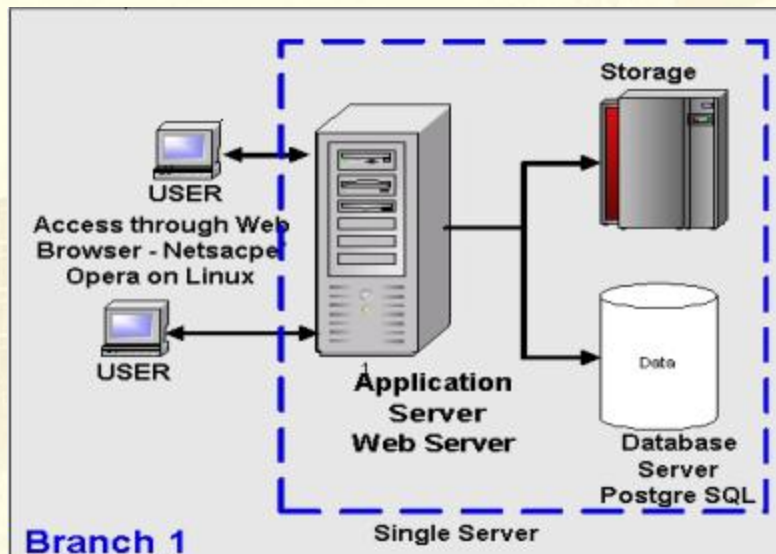
Storage for Images

Database Server

Postgre SQL

Operating System

RHEL (RedHat Enterprise Linux)

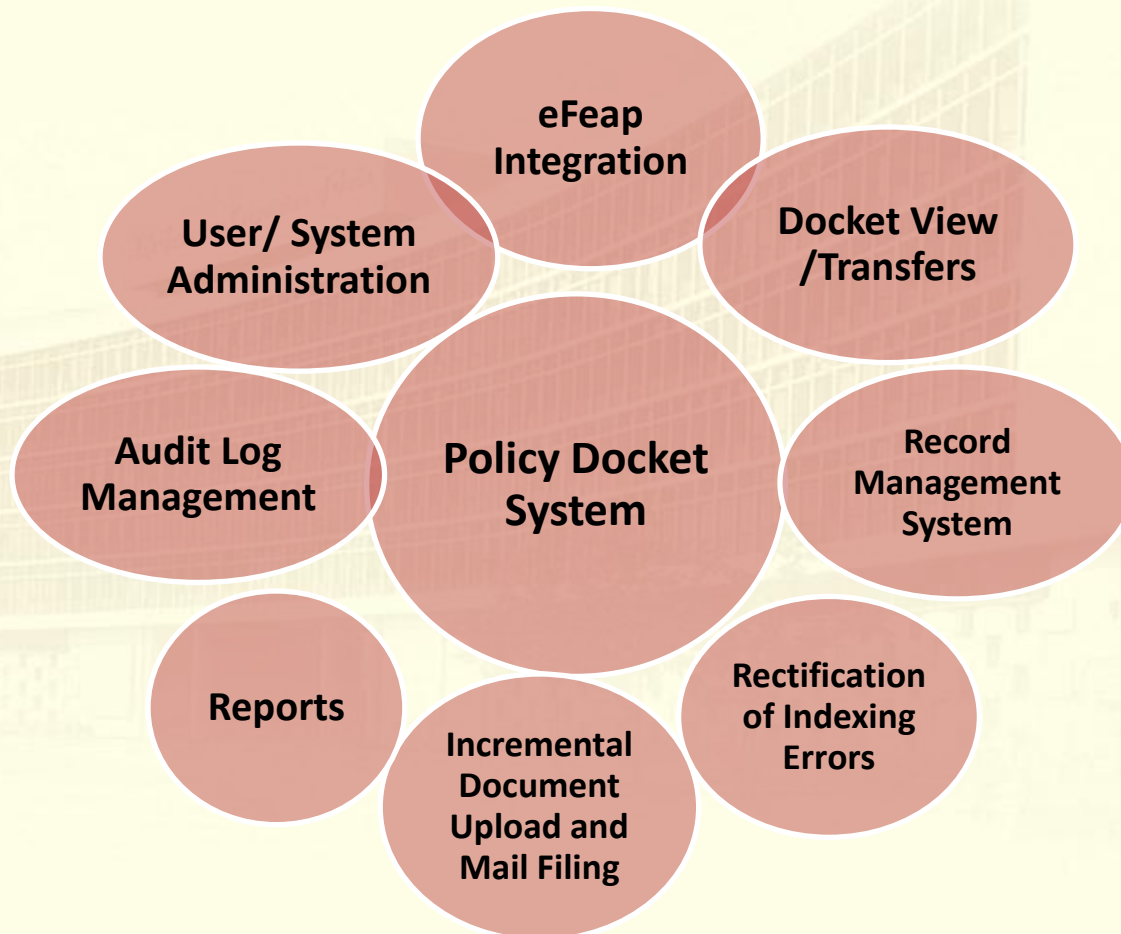


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Existing EDMS Components - BO/DO



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Existing Network Bandwidth for all activities

Link type		MAIN LINK	VPNoBB (Back-up link)	MPLS (Back-up link)
SO to PBO		512 Kbps(MPLS)	256 Kbps	--
BO-DO (Categorisati on according to Average Number of Transactions per year)	Small	2 Mbps(LL)	512 Kbps	--
	Medium (Incl. STCs)	2 Mbps(LL)	1 Mbps	--
	Big (Incl. ZTC/CCC/ Info-Center etc.)	2 Mbps(LL)	2 Mbps	--
DO-ZO		4 Mbps(LL)	--	45 Mbps
ZO-CO		8 Mbps(LL)	--	100 Mbps

Integration with the Core Business Application

- ❖ e-Docket View (New Business, Sales, Policy Servicing, Loans & Surrenders, Claims etc.)
- ❖ Endorsement Automation (Loans & Surrenders, Claims, Policy Servicing etc.)
- ❖ Storing of Core Business Application generated document, electronically (Loans & Surrenders, Claims, Policy Servicing etc.)

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Areas in focus

- Hardware – which has surpassed average life cycle period
- WorkFlow System
- Back up Window
- Live Data replication
- Server Restoration

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Areas in focus

- Disaster Recovery System
- Middleware support
- Integration with Core Business Application and other Systems
- Compliance to Regulatory / Government requirements
- Customer communication channels

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Checklist

- Annexure – A1 Capability of the Bidder / System Integrator
- Annexure – A2 Pre-Qualification Criteria
- Annexure – A3 Bank Guarantee Format for EMD
- Annexure – A4 Technical Bid particulars to be provided by the Bidder
- Annexure – A5 Non-Disclosure Agreement Format

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Checklist

- Annexure – A6 Benchmark Specification
- Annexure – A7 Service Support Details
- Annexure – A8 Commercial Bid Covering Letter
- Annexure – A9 Commercial Bid Form
- Annexure – A10 References
- Annexure – A11 Pre Contract Integrity Pact

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Expectations

- ❖ Hardware – Sizing and quantity with specifications
- ❖ Workflow Systems
- ❖ Software – Best suited for LIC – With specific Web Server / Application Server / Database / Operating System with Version nos.
- ❖ Data replication to DR Sites automatically

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Expectations

- ❖ Back up with minimum time window
- ❖ Project Management – Man power to handle the System, Geographical spread of the Company / Partners
- ❖ Scanning Activities & Logistics – Capacity
- ❖ Migration Activities – Road map, Strategy, Tools

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Expectations

- ❖ Integration with LIC's other Systems
- ❖ Compliant to the two factor authentication initiative of LIC
- ❖ Interaction with external repositories/ organisations

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Expectations

- ❖ MIS Reports / Dashboards at all levels
- ❖ Real Time Updates, Analysis and Tracking of all Activities
- ❖ End of Contract Migration – Road map, Strategy, Readiness with Industry Standard formats (non-proprietary format) for smooth migration to the subsequent system

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THANK YOU