

## **The Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden (PERSGA)**

### **Terms of Reference (ToR)**

### **Consultant Firm for Implementation of PERSGA Knowledge & Content Management System and Upgrading PERSGA Website**

#### **Under the Project**

#### **Sustainable Fishery Development in the Red Sea and Gulf of Aden (SFISH)**

<b>Program/Project Number:</b>	<b>P178143</b>
<b>Activity Code:</b>	<b>PERSGA-2103-CS-INDV</b>
<b>Duration</b>	120 working days
<b>Expected Start/End Date of Assignment</b>	April 2023 up to December 2025

### **1. Background**

The Regional Organization for Conservation of the Marine Environment of the Red Sea and Gulf of Aden (PERSGA) is an intergovernmental organization established since 1995. PERSGA institutional framework is based on the Regional Convention for the Conservation of the Red Sea and Gulf of Aden Environment (Jeddah Convention 1982), which joins seven member states, including Djibouti, Egypt, Jordan, Saudi Arabia, Somalia, Sudan, and Yemen. Rational use of marine resources and the protection of coastal marine environment from pollution and overexploitation are central objectives of Jeddah Convention (1982) and its derived Regional Protocols and Action Plan. PERSGA runs regional programs and projects that support regional capacities and coordination to achieve these objectives.

The announced consultancy is needed for implementation of the regional project “Sustainable Fisheries Development in the Red Sea and Gulf of Aden”, referred to hereafter as the Project or SFISH, which is supported by the World Bank and executed by PERSGA in the region. The project development objectives is to strengthen capacities and regional collaboration in management of marine fisheries and aquaculture in the Red Sea and Gulf of Aden region.

The SFISH project component objectives focus specifically on: i) developing PERSGA regional data center and integrated information system for monitoring and assessment, and sharing knowledge to support science-based policy and management of sustainable fisheries and aquaculture in PERSGA region; ii) strengthening PERSGA platforms for capacity development and regional coordination mechanisms; and iii) enhancing citizens, private sector and development partners engagements in sustainable fishery through effective communication and awareness strategies.

In this framework, PERSGA will need implementation of efficient Content and Knowledge Management System, and to redesign and upgrade its website.

## 2. Purpose of the consultancy

PERSGA is planning to hire a qualified vendor to provide the requested scope-of-work as part of automating and digitizing its internal environment and web presence. Thus the consultancy work will include two parts

- PART 1: PERSGA Knowledge and Content Management System
- PART 2: Designing and Upgrading PERSGA Website

### A) PART 1: Knowledge and Content Management System

PERSGA is looking to implement a recognized “KNOWLEDGE AND CONTENT MANAGEMENT to be the centralized document repository for all the organization’s knowledge and content sources. The Scope of Implementation includes storing, processing, archiving and retrieving documents from all PERSGA Departments with abilities for all PERSGA team to search & retrieve documents based on high-level of security and access rights.

The proposed solution should be able to link related documents together, automatically import, automatically capture and automatically index the documents. All with minimum/no human interaction.

#### *Scope of implementation:*

The scope of the implementation will include the following PERSGA units:

- |                                   |   |
|-----------------------------------|---|
| 1- Secretary General Office       | 9- Marine Biodiversity                          |
| 2- EMARSGA                        | 10 – Economic Valuation and Sensitivity Mapping |
| 3- Projects Management            | 11 – LMR, Fisheries and Aquaculture             |
| 4- Land Based Pollution           | 12 - Adaptation to Climate Changes              |
| 5- Finance & HR                   | 13 - Information Technology & Modeling          |
| 6- Regional Monitoring            | 14 - E-Library                                  |
| 7- Public Awareness and Education |   |
| 8- Marine Pollution               |   |

#### *Document types:*

The implementation phase will include all PERSGA Document types to be captured, indexed, and stored automatically with minimum – no human interaction. Also, the provided system should include the ability to read, recognize, split and index the documents automatically by bar-code or Document Template despite the document source.

#### *Integration:*

The KCMS requirements include integration with the following in-place and probable future systems to store & retrieve documents:

- Core systems like Finance, HR, Oil Pollution modeling.
- Outlook Exchange.

- MS office applications.
- PERSGA Website.

PERSGA KCMS should be capable and scalable to allow users to store new documents by scanning or importing, retrieve the documents to view, edit, print, e-mail and download based on the access rights granted to the user.

***Integration with Outlook:***

The proposed solution should be able to integrate with Microsoft Outlook to search, store and retrieve e-mails, attachments, and documents.

***Scalability:***

The proposed KCMS should be scalable for future expansion without any limitations including but not limited to; file size, file type, file repository size, and number of files archived.

***Other Features:***

Based on PERSGA requirements, the proposed solution should include and support the following:

- Document set.
- Document versioning.
- Document Clipping.
- Document Encryption.
- Retention Policies & Task Lists.
- Automatic Reference Number Generation.
- Stamps & Annotations.
- User Access Rights.
- Single Sign-on.
- Arabic user interface.
- OCR (Arabic & English).
- Main UI English, but support Ar&Fr
- Hijri calendar
- Adding keywords

Further PERSGA KCMS technical features and requirements for document management system is provided in Annex (1)

**QA PLAN**

PERSGA shall govern the project lifecycle by applying the following dealings:

- Full profile due diligence of the supplier to be selected.

- Mapping of the KCMS application features with the operational needs of the PERSGA.
- Ensure proper documentation of the project execution from initiation to completion, such as: SOW Document/ BRD, Project Charter, Milestone Delivery Notes, and Project Completion sign off.

### ***SECURITY MEASURES***

Ensure that the Hardware (Server) and Software infrastructure (OS, DB, KCMS application) are meeting the industry best practices.

### ***System Training Program:***

The Implementing company should provide PERSGA with the below training sessions after completing the implementation phase:

- Awareness Training Sessions.
- End Users trainings.
- Training-of-trainers (for system run) and administration training.
- Web Integration Tool Administration.

### ***Support after system handover:***

The offer should consider technical maintenance support for (24 months) starting after final handover

## **B) PART 2: Designing and upgrading the PERSGA website**

PERSGA website ([www.persga.org](http://www.persga.org)) needs to be redesigned and developed to integrate with, and reveals the newly developed Content and Knowledge Management System, and improve aptitude to support existing and upcoming projects and activities interactively. The aim for the new website and other web-pages proposed in this RFP is to address this purpose, and to promote interaction and collaboration with key users and stakeholders. The main objectives are to increase the PERSGA's online presence, enhance reachability and interaction with PERSGA programs, projects, database, information system, educational and awareness activities, social media channels, etc.

The templates will provide a new look-and-feel to the web and will unlock the potential functionalities of the current software while displaying the content in a more organized, attractive and user-friendly manner.

### ***Scope of the work:***

The website developer will work closely with PERSGA team to assess gaps and needs and confirm that the deliverables meet all (but not limited to) the following criteria

- The new visual look for PERSGA website is well-designed to enhance its desired functionalities to provide a better experience to users.
- The website will be efficiently linked and interactive with the Knowledge and Content Management System, including its sectoral relevant databases and information systems indicated in Part 1 above.
- Design and develop a highly secure website for PERSGA, including website videos.
- Development of website capabilities to allow the website to be available in English, Arabic, and French utilizing Google Translate Plugins, or similar software.
- providing analytics and reporting structure for website traffic, visitor location, visitor language and general report generation
- The website must be designed and supported by the most advanced and secure website software technologies and backup capabilities.
- The overall design of the website must be user-friendly with access to information no more than two/three clicks.
- Secure support and maintenance: Administrative and technical support, and quality control for a period of 12 months.
- Source code handover: Full source code including all developed libraries shall be handed over to PERSGA.

- The consultant will be provided with the opening and primary Website content (text, imageries, captures, etc.) of the new website dashboard and subdomain sites
- The current website appears on the top of most of the existing search engines, the vendor will guarantee the same for the new version, and will work more on enhancing and promoting the online existence of PERSGA.
- Systems security and stability is the first priority for PERSGA, so no free libraries, plugins or add-ons should be included neither in its website nor in other systems without written approval from PERSGA IT team.

### 3. Key Deliverables and Tentative Timing

The vendor should be able to utilize the required number of specialists during the project’s implementation and training phases. A minimum number of four specialists are required to work on the project and provide the needed consultation in order to be able to implement the KCMS and the Website design and upgrading as per the below table.

Project Activity	Actual working days	Distributed over a period of
System Analysis and design	70	3 months
Implementation	70	3 months
Training	15	2 months
Remote Support after handover	25	24 months
<b>Total</b>	<b>180</b>	<b>32 months</b>

#### *Key Deliverables:*

Deliverables	Time from Contract Signing
Project inception report	2 weeks
Scope definition and system technical specifications	2 months
System design report	4 months
Full System Implementation & user manuals	7 months
System training report	8 months
Progress reports on remote support and follow-up	Every 3 months over one year
Final consultancy completion report	32 months

### 4. Duty station and duration

Duty station is office based with in-situ field visits to PERSGA for consultations, assessments, site work, provision of technical training and advice. The consultancy work including system analysis, design, implementation and training will be completed over 8 months, in addition to remote support follow up period of 2 years for troubleshooting and maintenance. Total actual working days is estimated as 180. The vendor technical team will conduct several visits to PERSGA HQ with duration of stays subject to the fieldwork required for each activity.

## 5. Qualification, Skills and Experience

The following criteria and skills are expected to be met by the applicant firm:

- Vendor should be with minimum 10 years of operational experience in knowledge and content management systems,
- Market presence, preferably with existing customer based in Saudi Arabia or PERSGA region. Existing clients in city of Jeddah is a plus.
- Has certified implementers & Technical support employees.
- A Proven track record of successful similar works, including system packages and services.
- Capacity to sensibly understand the relevant subjects, e.g. for natural resources, marine environment, organizational documents and similar themes targeted by the management
- Ability to communicate openly and integrate all feedbacks provided.
- Able to provide support for troubleshooting during PERSGA working hours, (from Sunday to Thursday 09:00 am to 17:00 pm, KSA time )
- Committed to comply with the Environmental and Social Safeguards Standards adopted by the project emphasized in the Project (Environmental and Social Commitment Plan and Labor Management Procedures documents (<https://persga.org/sfishproject/>))
- The Intellectual Property Rights of the application will rest with PERSGA.

## 6. Application procedure

- Interested applicants should submit Expression of Interest (EoI) letter and firm profile/related documents, including technical team resumes to the following email address: **procurement@persga.org**
- Applications should be received no later than **17 March 2023 (23:59 Riyadh Time Zone)**
- EoI letter should indicate the consultancy title and Activity Code mentioned above in first page of the ToR.

## Annex (1) KCMS technical features and requirements for Document Management System

Item	Description
<b>Web Client</b>	
1.	Online access to system via Browser without client installation
<b>Windows Explorer Client</b>	
2.	Access system via Windows Explorer
3.	Store all types of documents from any source in electronic file cabinets – create any number of file cabinets per system depending on the operation scalability
4.	Store scanned documents, files, and emails in file cabinets
5.	Access the most important functions via shortcuts
6.	Large number of documents (billions) documents– any document size
7.	Import of documents from the file system with drag & drop feature
8.	Transfer imported files in the original format including video and audio formats
9.	Store compressed documents. This saves hard-disk space without causing any restrictions for the Clients
10.	Store encrypted documents in the system. To allow documents to only be made visible via system.
11.	Each user can create any number of electronic document in their system to initially accommodate documents after they are scanned or imported
12.	Drag and drop a document from the KCMS to attach it to email
13.	Archive document in the same way as an existing one: Drag and drop document from the system to a document with the same index words
14.	Option to staple multi-page documents or to unstapled documents in the document system
15.	Display of the total page count for each document in the table and index card view
16.	Call up Scan App using button in the system
<b>Storing Documents and Adding Index Words</b>	
17.	Assignment of search criteria using freely definable dialog –
18.	Quick input option for current date
19.	Automatic check of index words for plausibility, validation
20.	Fast indexing by pre-indexing documents in the system
21.	External select list: specification of index words from external databases
22.	Use filtered external select list when storing
23.	Automatic storage of pre-indexed documents
24.	Automatic numbering of documents when storing
25.	The directory name is adopted as an index word when stored using Windows Explorer Client
26.	Support for error-free index word entry using predefined field dialogs. At each position of the index word, the user can only enter those characters that are specified in the dialog definition
27.	Document search using index words
28.	Option to enter index words with wildcards – asterisk search,etc.



29.	Search with the logical operators AND, OR, and NOT (including for index filters)
30.	Automatic saving of the last searches so that they can be easily used again
31.	Hierarchical search using select lists
32.	Definition of fields used for selective select lists
33.	Dynamic document links: all documents that belong to the same process can be displayed in a further result list – documents with an identical index word in the defined field(s) called up directly in result list or viewer. For example, all documents with the same project name can be displayed in a linked result list
34.	Display of the documents in folder structures for intuitive access to documents without filling in the search dialog
<b>Document and Data Export</b>	
35.	Found documents can be exported to: Document file system or email client
36.	Export result list as CSV file (whole result list or just entries of the page of the result list currently displayed) and process it further directly
<b>Displaying Archived Documents</b>	
37.	Display documents in system Viewer – all common file formats are supported
38.	Download documents from system, original file or PDF
39.	Different file formats can also be displayed within a logical document – important for displaying emails with attachments, for example
40.	Simultaneously open several documents in separate Viewer windows
41.	Zoom factor for a document is automatically stored to display the following documents.
42.	Documents displayed in optimum width without a margin in the system
43.	Automatic image enhancement in system Viewer: Rotate and/or deskew document
44.	Automatically refresh the display of a document in the system Viewer when it has been changed using the "Edit" function in the viewer
<b>Fulltext Indexing and Searches</b>	
45.	Automatic full text indexing of file system
46.	Fulltext indexing of scanned documents with powerful text recognition and of other common formats with an integrated text filter
47.	Option for fulltext search with wildcards before and after a word
48.	Option for phrase search and distance search
49.	Text view for fulltext searches (in addition to thumbnail view and document name): Display of first section of text, which contains the search term (highlighted)
50.	In system Viewer, fulltext search terms are highlighted in the document, in the display of both scanned documents and other documents that are present as coded information (CI)
51.	Sorting of fulltext search results according to relevance, i.e. frequency of the index word
52.	Automatic recognition of the document language
<b>Editing Documents</b>	
53.	Archived documents can be opened and edited in the editor
54.	Attach a document from system to a document in a file cabinet
<b>Editing Documents</b>	

55.	Open and edit archived documents in system Viewer: Mark and annotate documents with overlays – without modifying original document
56.	Open info box for document to view index entries and change them if necessary
57.	Display document in the Viewer with index dialog
58.	File properties are displayed in the Viewer as buttons and are copied to fields by clicking
	Numerous editing options in system Viewer: e.g. signature on touch displays. Save custom settings for all tools, e.g. font size or color
59.	Text passages can be highlighted on any page of a file
60.	One-click indexing: Select words, dates, and numbers by mouse over and transfer them into the store dialog with a single click. Support Automatic recognition of the document language possible
61.	Copy text to the clipboard to use it in other applications
62.	Several overlay levels can be individually shown/ hidden
63.	Merge annotation levels with the document to permanently fix all annotations and stamps
64.	Overlays can be printed with document
<b>Electronic Stamps in the Viewer</b>	
65.	Personal and public stamps in the system Viewer for processing documents; workflows based on Task Manager are initiated by stamps
66.	Password prompt for stamps in order to increase security for stamp processes
67.	Customization of stamps, e.g. with scanned-in signature as well as stamp date, time and user ID of person signing
68.	Stamps can be customized by adding form fields: option to enter variable information when stamps are applied (including using fixed and external selection lists – not for BUSINESS Server)
69.	Set electronic signature by applying a stamp
70.	Permanently activate stamps for quick stamping
71.	Stamps can be used for both scanned documents and for Office, PDF, and other file formats
72.	Stamps can change up to five selected index entries in a document by setting a stamp
73.	After stamping a document, automatically open the next one from the current list/document tray
74.	Automatically close viewer after applying stamp
<b>Version Management</b>	
75.	Automatic version management: a new version is created for every document processed directly in the system
76.	Manual version management: Version control per document by checking out and checking in; document is locked for further editing by checking out
77.	Display of the version history and option to go back to previous versions
<b>Digital Signature</b>	
78.	Set a simple signature by applying the stamp
<b>Forwarding/Sending Archived Documents</b>	
79.	Send any document via email directly from a system document tray or viewer
80.	Send parts of documents by email, i.e. single files

81.	Send several documents simultaneously by email directly from a result list
82.	Send hyperlink to a document by email
83.	Send hyperlink to a result list by email
84.	Copy a hyperlink to an archived document or a result list to the clipboard, e.g. to then insert it in other documents or programs
85.	Use MAPI-compatible mail system
<b>Perfect Overview and Maximum User Convenience</b>	
86.	Customize column width and functions for the result lists
87.	Columns in result lists can be individually sorted and enabled/disabled one at a time
88.	Display of number of documents in a list at the top of the list, colored highlighting if the number changes
89.	Search/store dialog can be customized for individual users or groups
90.	Display of user-specific functions directly via result list and document history (functions are specified in Administration)
91.	Maximum reading clarity in a small area due to optimizing display
92.	Automatic login (Single Sign-On) by saving the system user ID using cookie
93.	Use of the Windows login to log into system (Single Sign- On)
94.	User-interface language can be freely selected in personal settings
95.	Configure out of office settings in user profile
96.	system Update: Automatic message from new system versions or hotfixes for Client components and apps that are available
97.	Create data record without document in the system, e.g. in order to attach documents downstream
98.	Access an archived document from an application in read-only mode via "Open"
99.	Display archived documents in read-only mode in the application stored in Windows Explorer for that file extension
100.	Unlimited Client licenses for read-only (Search & Retrieve only) access to file cabinets.
<b>Monitoring Folders and Importing Documents</b>	
101.	Monitor file folders for automatic import of files
102.	Folder to monitor freely selectable (directory on local PC or server/network)
103.	Import scanned documents via network scanner
104.	Schedule a check of the import directory for new files: continuously or at flexibly configurable intervals
105.	Check the minimum age of files to prevent importing incomplete files
106.	Store documents in system
107.	Automatic transfer of fixed entries as index words
108.	Automatic transfer of dynamic entries as index words, e.g. user, file name, file extension, creation or modification date
109.	Automatic reading of content from defined readout areas of the document. This content is used for indexing e.g. transferring PERSGA name from an invoice into the respective index field
110.	When indexing, user should be able to combine fixed entries and dynamic entries with text readout areas in an index field

111.	Split the content of text readout areas to transfer separate parts to different index fields
112.	Replace the content of text readout areas with different text, e.g. replace the index word "Invoice" with the expanded term "Invoice – output"
113.	Filter out spaces and zeros from recognized text, e.g. delete spaces from IBAN numbers
114.	Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount, which is always at the end to the right of the word "Total"
115.	Switch off text and barcode recognition at import in order to speed up document processing when this function is not required
116.	Index document with 1D and 2D barcodes
117.	Select barcode type to be searched for and used for indexing
118.	Filter barcodes with exact specification of characters
119.	Split the content of barcode readout areas to transfer separate parts to different index fields.
120.	Automatically overlay forms and letterheads, e.g. invoice form – can be done separately for first page and subsequent pages
121.	Split multi-page documents after a fixed number of pages
122.	Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1")
123.	Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number
124.	Split multi-page documents after barcodes
125.	Automatic deletion of separating pages
126.	Identify and classify document according to the file name and/or the directory (i.e. a specific configuration is always run if, for example, "Invoice" appears in a scanned document at a specific location)
127.	Identify and classify document according to text criteria or bar code
128.	Embed electronic signature in PDF
129.	Automatic recognition of the document language possible
130.	Automatic rotation and desk wing of pages that have the wrong orientation or were scanned at an angle
131.	Automatically attach processed document to a new email, e.g. electronic invoice
132.	Also import metadata (indexing data) of documents when importing from external applications
133.	Select sample document from file system or document tray
134.	Initiate the import configuration from a document in the document tray and use the document as a sample document for a new import configuration
<b>Reading Out Text and Overlaying Forms/Letterheads</b>	
135.	Define readout areas based on parts of text within the document (setting an anchor), e.g. the invoice amount, which is always at the end next to the word "Total"
136.	Automatically overlay forms and letterheads, e.g. a scanned invoice form – can be done separately for first page and subsequent pages
137.	Split multi-page documents according to text criteria defined using readout areas (e.g. "Page 1")

138.	Split multi-page documents after a blank readout area or if the content of the area changes, e.g. no page number
139.	Automatic deletion of separating pages
<b>Reading Out 1D and 2D Barcodes</b>	
140.	Automatic reading of content from defined barcode readout areas of the document. This content is used for indexing
141.	Select barcode type to be searched and used for indexing
142.	Filter barcodes with exact specification of characters
143.	Split the content of barcode readout areas to transfer individual parts to different index fields
144.	Split multi-page documents after barcodes
145.	Define readout areas based on barcodes on the document (set anchors)
146.	Split multi-page documents after a fixed number of pages
147.	Split multi-page documents after a blank readout area or if the content of the area changes
148.	Automatic deletion of separating pages
149.	Select an external data source: system file cabinet, database table of system (after release through Local Database Connector), database view, SQL command
150.	With file as external data source: read/write access or read- only access, move or delete file on completion of workflow. Data must be organized using separators or fixed field lengths
151.	Web Service integration tool should users the ability to store documents in DMS from within the convenience of the user interfaces of these applications, as well as to retrieve documents already stored in DMS in a similar fashion.
152.	System should provide an automation interface using its SDK including Web Services and APIs. And should eliminate most of development efforts that is required when working with standard SDK tools.
153.	A user will only need to click a button in the business application to invoke the linking operation with DMS. This button is captioned with “Documents” which is a clear indication of its function. Upon clicking the newly added “Documents” button in the business application.
154.	The Integration tool returns an encrypted URL. The calling application uses this URL to launch a window that includes list of required document(s)
155.	The user can select from among a preset group of actions to be performed with the originally specified index information such as viewing or downloading a document. The user can also scan or upload a document with this index information.
156.	Store Emails directly to the system.
157.	Copy\Move Emails to document trays.
158.	Emails can be archived in the following formats: MSG (Outlook) and PDF.
159.	Use information from XML invoices in email attachments for indexing.
160.	Integrated DMS menu bar and context menu in Outlook.
161.	Store emails using the DMS menu bar
162.	Store emails using the DMS context menu
163.	Send and store emails from MS Outlook in a single step.
164.	Archive email and attached files as one document.
165.	Archive email and attached files as individual documents.

166.	Archive email without attached files.
167.	Archive attached files without email.
168.	After storage in Outlook, mark the email as archived with the "DMS" category
169.	After storage in Outlook, delete the email's attached files.
170.	After storage in Outlook, delete the email.
171.	Choose what to show first in stored document: Email or Attachments.
172.	Storage type for individual email can be selected regardless of the configuration: Email and appended files (show email first), email and appended files (show attachment first), only appended files, or only email.
173.	Remove images from the archiving that are embedded in the message text.
174.	Emails are marked in the result list with a specific icon.
175.	Any number of different storage destinations can be defined: the emails are sent to their specific destination according to the configuration selected.
176.	Watched folders are automatically created (if they do not already exist); store by dragging an email to the folder. Email can remain in watched folders.
177.	Watched Folder configurations can be set to watch subfolders also.
178.	Email stored to Watched Folders can be filtered by Sender, Sender Domain, Subject, Recipient or Recipient Domain.
179.	Storage with and without store dialog.
180.	Identification of mandatory fields with asterisks (*) in storage, search, and info dialogs.
181.	If mandatory fields are not set, the store dialog always opens (even with other settings).
182.	Find documents archived in DMS connected to an email at the click of a button (e.g. from the same sender).
183.	If only the attachments of an email were deleted in Outlook: access these attachments again at the click of a button.
184.	Access DMS lists from Outlook.
185.	Any number of storage configurations can be set and assigned directly to users or via certain roles.
186.	Any number of quick search configurations can be and assigned directly to users or via certain roles.
187.	Update configurations with one click.
188.	Start new configurations from Outlook in the Store and Quick Search selection menus, or by right clicking on a folder.
189.	Administrators can create storage and quick search configurations for all users.
190.	Non-administrators (basic users) can create storage and quick search configurations for themselves if they have the necessary rights.
191.	Use fixed values as index words for archiving.
192.	Select email properties as index words for archiving (sender, subject, etc.).
193.	Use predefined entries as index words for archiving (CURRENTDATE, and any other common fields).
194.	Select information about the recipient/sender from the Outlook contact (name, company, etc.) as index words for archiving.
195.	Select information from other DMS file cabinets as index words; email addresses can be used as match code.
196.	Support of other external SQL databases (MySQL, MSSQL, Oracle) for automatic expansion of index words: email addresses can be used as match code.
197.	Storage with and without store dialog.

198.	Avoid duplicate storage of emails by using the mail system's message ID for indexing.
199.	Exclude chosen file formats from email storage with the option to filter those formats by size. This allows business cards or company logos in email signatures, which would otherwise be saved as a separate file, to be skipped.
200.	If mandatory fields are not set, the store dialog always opens (even with other settings).
201.	Define mandatory fields per dialog: Storage, search, and index dialogs can have different mandatory fields. Identification of mandatory fields with asterisks (*).
202.	Use fixed values as index words for quick searches.
203.	Select storage type: Email and appended files (show email first), email and appended files (show attachment first), or only appended files.
204.	Archive email attachment directly by right-clicking on the attachment and using the context menu.
205.	Select email properties as index words for quick searches (sender, subject, etc.)
206.	Use predefined entries as index words for quick searches (e.g. CURRENTDATE (-30) for the last 30 days).
207.	Select information about the recipient/sender from the Outlook contact (name, company, etc.) as index words for quick searches.
208.	In quick search, use the storage date as a search criterion, thus limiting the results, for example, to the last 14 days.

***PERSGA KCMS should be able to support the following File formats:***

<b>File format</b>	<b>File extension</b>
<b>Drawing, Drawing Exchange</b>	<b>DXF</b>
HPGL	HGL,HPG, PLT, PRN
HPGL/2	HGL,HPG, PLT, PRN
<b>Vector Graphics Formats</b>	
<b>Acrobat PDF</b>	<b>PDF</b>
AmiPro Graphics	SDW
Corel Presentation Exchange	CMX
Enhanced Metafile	EMF, EMZ (Compressed)
Illustrator	AI
Lotus PIC File Image	PIC
PCL	PCL, PRN
PowerPoint	PPT
PowerPoint	PPTX
SVG	SVG
Windows Metafile	WMF
WordPerfect Graphics	WPG
VISIO	VSD
<b>Raster &amp; Bitmap Formats</b>	
<b>AIIM MS53</b>	<b>A11</b>
AMIGA	IFF, LBM
Compuserve GIF	GIF, RLE
CorelDraw! Bitmap Preview	CDR
CUT Raster	CUT
Databeam	DBX
Dr. Halo PIC	PIC
GEM IMG Bitmap	IMG
IBM IOCA/MODCA	
JPEG	JPEG, JPG
JPEG 2000	JP2,JPF, J2K, J2C, JPC, JPX
MAC	MAC
Neutral Raster File	NRF
OS/2 1.1 Bitmap	BMP
Paintbrush PCX	PCX
PNG	PNG
Portable Bitmap	PPM



SUN Raster File	PR
TARGA	TGA
Windows Bitmap	BMP
Windows 3 Icon-Resource	ICO
WordPerfect Graphics Bitmap	WPG
X-Windows Dump	XWD
<b>Database Formats</b>	
<b>File format</b>	<b>File extension</b>
<b>Access</b>	<b>MDB</b>
Database Express	DBM, FRM, TDF
Fox/Dbase	DBF
Paradox	DB
Paradox Index File	PX
<b>Fax Formats</b>	
<b>Brooktrout</b>	
Everfax	
Frecom	
Fujitso	
Gamma	
Generic-Fax	
Hybrid J-T	
Intel	
Net-Fax	
Product R&D Fax Modem	
Raw Group III	
Relisys	
Ricoh	
Scifax	
Smartfax	
Trigem	
Winfax Pro	
Worldport	
<b>Word Processor Formats</b>	
<b>File format</b>	<b>File extension</b>
<b>Amipro Document</b>	<b>SAM</b>
Amipro Style Sheet	STY

Plain Text (ASCII, UTF-8, Unicode, Multi-byte)	TXT
Rich Text Format	RTF
Word for DOS	DOC
Word for Windows	DOC
	DOCX
WordPerfect	WPD
WordStar	WS
	WS
Write	WRI
Microsoft Outlook	MSG
<b>Spreadsheet Formats</b>	
<b>File format</b>	<b>File extension</b>
<b>Excel</b>	<b>XLS, XLT, XLW</b>
	XLSX, XLTX
Lotus 1-2-3	
DOS, MACINTOSH, UNIX, WINDOWS	WR1, WR3, WRK
Lotus Symphony	WR1, WRK
Quattro	WK1,WKQ
Quattro Pro for DOS	WQ1,WKQ,
Quattro Pro for Windows	WB1, WB2, WB3
Symphony	WK3, WK4, WRK, WRL
<b>Archived Formats</b>	
<b>File format</b>	<b>File extension</b>
<b>7-ZIP</b>	<b>7Z</b>
ARC	ARC
ARJ	ARJ
BZip2	BZ2
CAB	CAB
Debian	DEB
GZip	GZ
LHARC Archive	LZH
RAR	RAR
RPM	RPM
TAR	TAR
ZIP Archive	ZIP