

**AMAJUBA DISTRICT MUNICIPALITY
REQUEST FOR BIDS**

BID No.: T2022/35

**SUPPLY AND IMPLEMENTATION OF INTEGRATED ELECTRONIC
DOCUMENT AND RECORDS MANAGEMENT SYSTEM**

Amajuba District Municipality hereby call for proposals from bidders with a recognised SAQA qualification in Archives and Records Management for the supply and implementation of Integrated Electronic Document and Records Management system. The company must be registered on the Central Supplier Database (CSD).

Bid documents will be emailed to the bidder upon producing proof of payment of a non-refundable fee of R500.00 per document. Deposits must be made into the Amajuba District Municipality bank account: Standard bank account N° 062156624 with the reference number 20223520223. Bidders are required to email proof of payment, name of bidding company and its contact details before **12h00, 02 December 2022** to khethiwem@amajuba.gov.za. Evaluation of bids will be done on bid companies that submitted their proof of payment before the closing date **02 December 2022**.

NB: This bid will be evaluated on price and functionality in terms of the 80/20 preference point system as prescribed in the Preferential Procurement Policy Framework Act (No 5 of 2000) and for this purpose the enclosed forms must scrutinized, completed and submitted together with your bid. The tender validity period is 150 days.

Bidders are required to submit original tax clearance certificate/ Tax Compliance Status Pin or CSD number and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids, to substantiate their B-BBEE rating claims. Failure to submit the proof of B-BBEE Certificate will result in forfeiting the points.

Completed bid documents in sealed envelope endorsed "**Bid number: T2022/35–Supply and implementation of Integrated Document and Records Management System**" must be deposited in the Municipality's tender box located in the reception of the Amajuba District Municipality on or before the closing date, whereby bids will be opened in public. Bid envelopes that are not sealed and numbered will not be considered. Late bids will not be accepted. The Amajuba DM is not obliged to award the lowest or any bid.

Technical enquiries must be directed to **Usha Naidoo** on 034 329 7200 or by email ushan@amajuba.gov.za and SCM related enquires must be directed to Sabelo Zulu on 034 329 7200 or by email sabeloz@amajuba.gov.za .

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Closing date: Friday, 09 December 2022 @12h00 noon

**MR T.B DUBE
ACTING MUNICIPAL MANAGER**





TERMS OF REFERENCE

SUPPLY AND IMPLEMENTATION OF INTEGRATED ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM

1. BACKGROUND

Amajuba District Municipality as a local sphere of government is required to comply with National Archives and Records Services Act (Act 43 of 1996), as amended and meet the file plan of all Departments of Amajuba District Municipality.

2. CONTRACT OBJECTIVES

Amajuba District Municipality requires an experienced service provider that will be able to provide an integrated Electronic Document and Records Management System for Amajuba District Municipality for the period of **thirty-six (36)** months. The required integrated Electronic Document and Records Management System must comply with the National Archives and Records Services Act (Act 43 of 1996). The appointed service provider should be able to provide a professional, efficient system that will be able to accommodate metadata and workflows provided by Amajuba District Municipality. Currently the bulk of Amajuba District Municipality's documents are in the form of physical paper and soft copy of randomly archived electronic documents on SharePoint server. The plan is to implement a central electronic document repository that is identical to a physical filing of Amajuba District Municipality and must both comply with the National Archives and Records Services Act (Act 43 of 1996) as amended.

3. BID REQUIREMENTS

The following bid requirements must be met, failing which the bid will be regarded as non-response and not evaluated any further.

- 3.1 Bidders must have a SAQA recognised qualification in Archives and Records Management (Proof of qualification must accompany the bid document).

- 3.2 Bidders must submit with the bid document appointment letters from current and previous clients.

4. SCOPE OF WORK

The Integrated Document and Records Management Systems must comply with SANS 15489, SANS 23801, and SANS 15801 and in line with Amajuba District Municipality Council Approved Records Management policy. includes the following:

- 4.1 To provide a professional, efficient Electronic Document and Records Management System that will allow records to be classified in accordance with Amajuba District Municipality 's records classification scheme as approved by National Archives.
- 4.2 Amajuba District Municipality requires a web-based Electronic Document and Records Management System that will be able to create, store, scan and record various documents to electronic media.
- 4.3 The system needs to be a safe and confidential integrated Electronic Document and Records Management System whereby documents can be created, scanned, indexed and electronically stored and retrieved in a manner that is easily and readily accessible.
- 4.4 The integrated EDRMS system must have a team workspace for document collaboration (e.g., team sites).
- 4.5 The integrated EDRMS system must be accessible from any computer linked to the Amajuba District Municipality computer network.
- 4.6 The integrated EDRMS must be highly secured and have the ability to assign rights and restrictions on the use or management of particular records in order to facilitate security.
- 4.7 The integrated EDRMS must be able to ensure that every folder is allocated to a record category within the records classification scheme.
- 4.8 The integrated EDRMS should not limit the number of folders that can be allocated to a record category or defined within the entire system.
- 4.9 The integrated EDRMS should be able to generate a sequential numeric or alphanumeric reference for a folder as defined by the approved file plan of Amajuba District Municipality.

- 4.10 The integrated EDRMS must prevent the destruction or deletion of folders, records and associated metadata at all times, except when authorized to do so by the System Administrator or the creator.
- 4.11 The integrated EDRMS should monitor access to the system and the audit trail should initiate automatically.
- 4.12 The integrated EDRMS system must have integration capabilities for both hardware and internal existing systems (e.g., printers, scanners, VIP, SAP, Microsoft Office and SharePoint etc).
- 4.13 The integrated EDRMS system must accommodate Digital Signatures / Biometric Signatures.
- 4.14 Migration of existing Amajuba District Municipality documents to the implemented integrated Electronic Document and Records Management System.
- 4.15 Training of staff and system administrators.
- 4.16 The integrated EDRMS system must meet the current requirements of the ADM ICT environment of 200MBps.
- 4.17 On-site support for the integrated EDRMS systems must be provided for the duration of contract.
- 4.18 The integrated EDRMS system must be a Cloud Based Solution, to avoid on-premises hosting.
- 4.19 **Software**
 - 4.19.1 The integrated EDRMS must be based on the windows environment and fully operational.
 - 4.19.2 The system must perform the following functions in user friendly manner:
 - 4.19.2.1 Electronic Document Management
 - 4.19.2.2 Document Workflow Management
 - 4.19.2.3 Single distribution
 - 4.19.2.4 Multiple Distribution
 - 4.19.2.5 Rule based distribution
 - 4.19.2.6 Auto distribution
 - 4.19.2.7 Mail Receive System
 - 4.19.2.8 Posted Mail Out (with templates)
 - 4.19.2.9 NARS File Management
 - 4.19.2.10 Access Security
 - 4.19.2.11 Full file contents capability
 - 4.19.2.12 Volume management

- 4.19.2.13 Disposal rules
- 4.19.2.14 Record Archiving
- 4.19.2.15 Distribution List
- 4.19.2.16 Preferential user list.
- 4.19.2.17 Barcode capability
- 4.19.2.18 Physical and electronic File distribution Management
- 4.19.2.19 Government & Provincial I Gazettes Register
- 4.19.2.20 Policies Register
- 4.19.2.21 Customer Care Management
- 4.19.2.22 Compilation of Agenda and Minutes
- 4.19.2.23 Paperless Agenda Capability
- 4.19.2.24 Agenda items/Reports Managing
- 4.19.2.25 Voice Recording of meetings
- 4.19.2.26 Manage Meeting Types
- 4.19.2.27 PDF Agenda to comprise of full indexing and bookmarks
- 4.19.2.28 Council Resolution Register
- 4.19.2.29 Uncompleted Resolutions
- 4.19.2.30 Completed Resolutions
- 4.19.2.31 Archived Resolutions Register
- 4.19.2.32 Tender and Contract Management
- 4.19.2.33 Full contract management and reporting
- 4.19.2.34 Integrated in Task manager
- 4.19.2.35 Integrate email and SMS functions
- 4.19.2.36 Electronic records retention and disposal
- 4.19.2.37 Electronic records audit trail
- 4.19.2.38 Integrated Email
- 4.19.2.39 Access Control (user with Limited privileged)
- 4.19.2.40 Authenticity of records
- 4.19.2.41 Documents Search Capability and Classification
- 4.19.2.42 Document Indexing
- 4.19.2.43 Cemetery Management
- 4.19.2.44 Documents Imaging capability
- 4.19.2.45 IT Help Desk Management
- 4.19.2.46 Contracts Register
- 4.19.2.47 SMS Management
- 4.19.2.48 PDF Document Combiner function
- 4.19.2.49 IDP & SDBIP Capability
- 4.19.2.50 Windows Domain Login
- 4.19.2.51 MS Outlook integration
- 4.19.2.52 Workflow Dashboard
- 4.19.2.53 Workflow Scheduler
- 4.19.2.54 Multiple signature Memo
- 4.19.2.55 Digital Signatures (Various methods)
- 4.19.2.56 Local User Customisation

- 4.19.2.57 Integrated Task Manager
- 4.19.2.58 Full Secure audit trail
- 4.19.2.59 Cheque/Invoice etc. module
- 4.19.2.60 Full on-line backup capabilities with reporting
- 4.19.2.61 Registers for Policies; Delegation of Powers; Legal Compliance; Payments; CV Register; Transport Permits; Movable Assets, Personnel Register, etc.
- 4.19.2.62 Traffic Fines Register
- 4.19.2.63 Charts capability (Gantt, Flow, etc.
- 4.19.2.64 Full Built-in Standard Reports
- 4.19.2.65 Fully integrated SMS capability
- 4.19.2.66 Full History of all documents capability
- 4.19.2.67 Venue Management
- 4.19.2.68 MSCOA MFMA Calendar built in
- 4.19.2.69 FMS integration - Contracts
- 4.19.2.70 Electronic Signature Capability (Signature)

5. QUALIFICATION AND EXPERTISE REQUIRED

- 5.1 The Service Provider must have a SAQA recognised qualification in Archives and Records Management (Proof of qualification must accompany the bid document).
- 5.2 The expertise and competencies of the project team on offer and should expressly detail their previous experience in dealing with projects of this nature. CVs of the team or managers must accompany the bid document.
- 5.3 To achieve the scope of work, the appointed service provider should demonstrate the following key competencies:
- 5.4 Comprehensive knowledge and proven track record of provision of Information Technology services, expertise and experience.
- 5.5 Capacity, expertise, and applicable resources to render the services throughout the contract period.

6. METHODOLOGY AND APPROACH

- 6.1 The bid document proposal must outline the methodology and approach to meet the deliverables, including:

- 6.1.1 Provide a project charter with timelines.
- 6.1.2 Provide a detailed budget for the project which must also outline a sign off and payment schedule.

6.1.3 **FULL MAINTAINANCE/SERVICE AND SUPPORT AGREEMENT
(Breakdown in detail)**

A service Level Agreement for a period of **36 months** will be entered into with the successful tenderer

6.2 The EDRMS must support compliance with the recordkeeping, evidential, privacy and access provisions of all relevant legislation and regulations, including the following:

- 6.2.1 National Archives and Record Service Act, (Act No 43 of 1996)
- 6.2.2 The Promotion of Access to Information Act, (Act No 2 of 2000), and
- 6.2.3 Other relevant ISO standards.

7. INTELLECTUAL PROPERTY RIGHTS

7.1 Copyright, patent rights and other similar rights

- 7.1.1 Copyright, patent rights and other similar rights in any works or products created as a result of the performance of this tender and its assignments shall vest in and are hereby transferred to Amajuba District Municipality unless specifically agreed otherwise, in the form of individual written Agreement signed by both parties.
- 7.1.2 All works created in terms of this tender and the assignments thereof shall be deemed to have been created under the control and direction of Amajuba District Municipality. All information documents, records and books provided by Amajuba District Municipality to any service provider in connection with the proposal or otherwise are strictly private and confidential.
- 7.1.3 Any proposer to any third party shall not disclose them, except with the express consent of Amajuba District Municipality, which shall be granted in writing prior to such disclosure.

7.1.4 Amajuba District Municipality however reserves the right to disclose any information provided by any service provider to any of the members of Amajuba District Municipality.

8. PROJECT MONITORING, EVALUATION AND REPORTING

The integrated Electronic Document and Records Management System services resides in the Corporates Services directorate. Director: Corporate Services is the custodian of this function, and the appointed service provider will liaise and report to him/her.

9. BID EVALUATION

Bids will be evaluated according to price and functionality, based on 80/20 preference point system.

9.1 Functionality Evaluation

The criteria in the below table will be used to evaluate the bids on functionality:

NB Bids will need to score a minimum of **10 points** in functionality to qualify for presentation evaluation

<p>1. Previous Work Experience:</p> <p>Provide integrated Electronic Document and Records Management System services assignments within the past ten (10) years.</p> <p>Appointment letters by the bidder of the EDRM system installed at the municipalities/ Government departments/ Organs of State.</p> <ul style="list-style-type: none"> • 1 to 3 assignments in past 10 years = 10 points • 4 assignments in the past 10 years = 15 points • More than 4 assignments in the past 10 years = 20 points 	<p>20</p>
<p>2. Presentation Evidence expected</p>	<p>30</p>
<p>Demonstration of integrated Records Management Solution (5 points each for compliance)</p> <p>1. Workflow Dashboard</p>	

2.	Document Workflow Management	
3.	System generated correspondence, both internal and external with client's letterhead	
4.	Record Archiving and Retrieval	
5.	Electronic records retention and disposal	
6.	Integration of the new existing municipal records in the integrated EDRM system	

NB Bids will need to score a minimum of **10 points** in functionality to qualify for presentation evaluation AND **total of 40 points overall** in order to be further evaluated on price.

10. RETURNABLE DOCUMENT

- All MBD documents must be completed and signed,
- Central Supplier Database (CSD) registration number.
- Certified proof of BBBEE certificate/Original sworn affidavit
- Company municipal rates, electricity or water account not older than 3 Months, proof of Residential lease or rental or sworn affidavit if the business operates at a place of residence

TERMS OF REFERENCE APPROVED BY

MR T.B DUBE

ACTING MUNICIPAL MANAGER