

TENDER DATA

1.	The Employer is: Thembisile Hani Local Municipality Private Bag X 4041 Empumalanga 0458						
2.	Tender Documents						
	<p>Tendering Procedures Tender notice and invitation to tender Tender data</p> <p>Returnable Documents List of Returnable Documents</p> <p>The Contract Agreements and Contract data Forms of Offer and Acceptance Contract Data</p> <p>Pricing Data Pricing Instruction Bill of Quantities</p> <p>Terms of Reference Terms of Reference</p> <p>Additional Relevant Documents Supply Chain Management Policy</p>						
3.	<p>Interpretation</p> <p>The tender data and additional requirements contained in the tender schedules that are included in the returnable documents are deemed to be part of these tender conditions.</p>						
4	<p>Communication.</p> <p>The Employer's Representative is;</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; padding: 5px;">Accounting Officer Mr. D.J.D. Mahlangu Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9100</td> <td style="width: 25%; padding: 5px;">Procurement Enq. Supply Chain Unit Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9187</td> <td style="width: 25%; padding: 5px;">Technical Enq. Mr T. Ntimane Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9185</td> <td style="width: 25%; padding: 5px;">Technical Enq. Mr. N.S. Maserumule Private Bag X 4041 Empumalanga 0458 Tel : 013 986 9192</td> </tr> </table>			Accounting Officer Mr. D.J.D. Mahlangu Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9100	Procurement Enq. Supply Chain Unit Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9187	Technical Enq. Mr T. Ntimane Private Bag X 4041 Empumalanga 0458 Tel: 013 986 9185	Technical Enq. Mr. N.S. Maserumule Private Bag X 4041 Empumalanga 0458 Tel : 013 986 9192
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4.1	<p>Attention is drawn to the fact that verbal communication given by the Employer's representative prior to the close of tenders will not be regarded as binding on the employer. Only information issued formally by the employer in writing to the tenders, under the signature of the Accounting Officer will be regarded as amending the tender documents.</p>						
5	<p>The Employer's right to accept or reject any tender offer</p> <p>The employer has the right not to accept the lowest tender and to accept the whole or part of any tender or not to consider any tender not suitably endorsed is fully reserved by the Thembisile Hani Local Municipality.</p>						

	6	Tenderer Obligations
	6.1	The Council retains the right to call for any additional information that it may deem necessary
	6.2	If tendering as a Joint Venture, Joint venture must be constituted by means of a comprehensive and fair, written agreement between the members, which sets out their obligations, rights, risks and rewards. Joint venture members should share at least the following aspects of the joint venture activities in a meaningful and equitable manner: 1. Control 2. Management 3. Operations 4. Risk 5. Profit and Loss
	6.3	If a Tenderer , or any person employed by him is found to have either directly or indirectly, promised or given to any person in the employment of Council, any commission, gratuity, gift or other consideration, The Council shall have the right to summarily and without recourse to law and without prejudice to any other legal remedy which it may have in regard to any loss and/ or additional costs or expenses, to disqualify the Tender or cancel the Contract without paying any compensation to the aforesaid Tender or Contract.
	6.4	At the request of the Municipal Manager or his authorised representative from furnishing him with additional information, or with a sample or specimen for testing purposes or otherwise, or from giving a demonstration so as to enable the recommendation to the Council's responsible Committee on the award of the contract be formulated,
7.		Proof of warrantee Service Provider must provide the client with proof of warrantee on the system
8		Compensation of tendering The employer will not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the cost of any testing necessary to demonstrate that aspects of the offer satisfy requirements.
9		Check documents The Tenderer should check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission.
10.1		Confidentiality and Copyright of Documents. Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation
10.2		Clarification Meeting A compulsory clarification meeting is not required, however for any clarification on the tender is welcome to send all enquiries on the following contact details: <u>NtimaneT@thembisilehanilm.gov.za</u> (ICT Assistant Manager) - 013 986 9171 <u>MaserumuleN@thembisilehanilm.gov.za</u> (Chief Admin: Records) - 013 986 9192

104	All enquiries must be lodged 07 days before close of the tender.
11	<p>Submitting tender offer:</p> <p>11.1 No Tender document will be considered unless submitted on Council's Official Tender Document</p> <p>11.2 Return all the returnable documents to the employer after completing them.</p> <p>11.3 The employer's address for delivery of tender offers and identification details to be shown on such tender offer package are:</p> <p>Location of tender box: Thembisile Hani Local Municipality Physical address : Stand no 24, Corner Police Station Kwaggafontein C , Empumalanga</p> <p>Telephonic, telegraphic, telex, facsimile or emailed tenders will not be considered</p> <p>11.4 All tender received by the Thembisile Hani Local Municipality will remain in the Municipality's possession until after the stipulated closing date and time.</p> <p>11.5 Accept that a tender submitted to the employer cannot be withdrawn or substituted. No substitute tenders will be considered</p>
12.	<p>Closing Time:</p> <p>12.1 The time and location for opening of the Tender offers are:</p> <p>Closing Time: 12:00 Closing Date: 02 November 2023 Location: Thembisile Hani Local Municipality Stand No. 24 Corner Police Station Kwaggafontein C Empumalanga 0458</p> <p>Tenders will be opened in public at the same time.</p> <p>12.2 After the opening of the tender proposals, no information relating to the clarification, determination of responsiveness, evaluation and comparison of tender proposals and recommendations concerning the award of the tender shall be disclosed to any other tenderer or persons not concerned with such process until the award of the Tender has been announced by the THLM.</p>
13.	<p>Pricing the tender</p> <p>State the rates and prices in Rand</p> <p>NB: Should exchange rates and price fluctuations, bidders affect prices should take forward cover and this be incorporated in the price tendered.</p>
14.	<p>Alterations to the Tender Documents.</p> <p>No alterations may be made to the tender document issued by the employer.</p>

	Proposals and any other supporting documents must be attached to the back of this tender document								
15	<p>Alternative tender offer.</p> <p>No alternative tender offers will be considered or accepted</p> <p>Alternative offers may be submitted only if a main tender offer, strictly in accordance with all the requirements of the tender document is also submitted. The alternative tender offer is to be submitted with the main tender offer together with a schedule that compares the requirements of the tender document with the alternative requirements the tenderer proposes.</p>								
16	<p>Tender Offer Validity</p> <p>The Tender offer validity period is 120 days from the closing date.</p>								
17	<p>Tender clarification after submission</p> <p>A tender may be regarded as non-responsive if the tenderer fails to provide clarification requested by the employer within the time for submission stated in the employer's written request.</p>								
18	<p>Tender evaluation points</p> <p>18.1 The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.</p> <p>18.2 Preference points for this bid shall be awarded for:</p> <p style="margin-left: 40px;">(a) Price; and (b) Specific Goals.</p> <p>18.3 The maximum points for this bid are allocated as follows:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center; padding: 2px;"></th> <th style="text-align: center; padding: 2px;">POINTS</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 2px;">PRICE</td> <td style="text-align: center; padding: 2px;">80</td> </tr> <tr> <td style="text-align: center; padding: 2px;">SPECIFIC GOALS</td> <td style="text-align: center; padding: 2px;">20</td> </tr> <tr> <td style="text-align: center; padding: 2px;">Total points for Price and Specific Goals must not exceed</td> <td style="text-align: center; padding: 2px;">100</td> </tr> </tbody> </table>		POINTS	PRICE	80	SPECIFIC GOALS	20	Total points for Price and Specific Goals must not exceed	100
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PRICE	80								
SPECIFIC GOALS	20								
Total points for Price and Specific Goals must not exceed	100								
19.	<p>Evaluation of Tenders</p> <p>The Tenderers notice is drawn to the fact that the evaluation, adjudication and awarding of this tender will be in terms of the Supply Chain Management Policy of the THLM.</p> <p>19.1 The following steps will be followed in evaluation;</p> <ol style="list-style-type: none"> 1. Determination of whether or not tender offers are complete. 2. Determination of whether or not tender offers are responsive. 3. Determination of the reasonableness of tender offers. 4. Confirmation of the eligibility of preferential points claimed by tenderers. 5. Awarding of points for financial offer. 6. Ranking of tenderers according to the total points 7. Performance of risk analysis by checking the credit record of the tenderers 								
19.2	<p>Evaluation Criteria</p> <p>The procedure for the evaluation of responsive Bids will be on the average of the previous three projects where the firm was involved</p> <p>The tenders shall be considered for further evaluation when they score 68 points out of 90 points</p>								

of the maximum **100** points allocated.

Summary of Functionality

Organizing and Staffing	30
Methodology and Project Plan to Implement the project	20
Experience of Firm	40
Total	90

Tenders are adjudicated in terms of THLM Supply Chain Management Policy, and the following framework is provided as a guideline in this regard.

19.3.1 Technical adjudication and General Criteria

- Tenders will be adjudicated in terms of *inter alia*:
- Compliance with Tender conditions
- Technical specifications

If the Tenderer does not comply with the Tender Conditions, the Tenderer may be rejected. If technical specifications are not met, the Tender may also be rejected.

With regard to the above, certain actions or errors are unacceptable and warrants

REJECTION OF THE TENDER, for example

- Pages to be completed, removed from the Tender document, and have therefore not been submitted.
- If tender document must be completed in full as required and as stipulated in the tender data.
- If any tender document is tempered with or it is unbinded or unbundled.
- Failure to complete the schedule of quantities as required – only lump sums provided.
- Scratching out without initialling next to the amended rates or information.
- Writing over / painting out rates / using correction fluid (without initialising thereof) or use of any erasable ink, e.g. pencil.
- Failure to attend compulsory site inspections where applicable
- The Tender has not been properly signed by a party having the authority to do so, according to the Form D – “Authority for Signatory”
- A Resolution by a Board of Directors of the Company authorizing the Tenderer to sign the Tender document on behalf of the Company. No authority for signatory

	<p>submitted.</p> <ul style="list-style-type: none"> ▪ Particulars required in respect of the Tender have not been provided – non-compliance of Tender requirements and/or specifications. ▪ The Tenderer's attempts to influence, or has in fact influenced the evaluation and/or awarding of the contract. ▪ The Tender has been submitted after the relevant closing date and time ▪ Failure to complete and sign Form C1.1 Form of Offer and Acceptance ▪ If any municipal rates and taxes or municipal service charges owed by that Tenderer or any of its directors to the municipality, or to any other municipality or municipal entity, are in arrears for more than three months. ▪ If any Tenderer who during the last five years has failed to perform satisfactorily on a previous contract with the municipality or any other organ of state after written notice was given to that Tenderer that performance was unsatisfactory.
19.3.2	<p>Size of enterprise and current workload</p> <ul style="list-style-type: none"> ▪ Evaluation of the Tenderer's position in terms of: ▪ Previous and expected current annual turnover ▪ Current contractual obligations ▪ Capacity to execute the contract
19.3.3	<p>Staffing profile</p> <p>Evaluation of the Tenderer's position in terms of:</p> <ul style="list-style-type: none"> ▪ Staff available for this contract being Tendered for ▪ Qualifications and experience of key staff to be utilised on this contract.
19.3.4	<p>Proposed Key Personnel</p> <p>In this part of the tender, the Tenderer shall also supply Curriculum Vitae (CVs) for the Staff available named and working on full time basis for the Tenderer. The CV should follow the normal Professional Format as used by Professional Service Providers.</p> <p>Each CV should give at least the following:</p> <ul style="list-style-type: none"> ○ Position in the firm and within the organisation of this assignment ○ PDI status (describing population group, gender and disabilities) ○ Educational qualifications ○ Professional Registrations ○ Relevant experience (actual duties performed, involvement and responsibility), including locations, dates and durations of assignments, starting with the latest. ○ Language proficiency and ○ References (company name, individual name, position held, contact details) <p>Much importance will be placed on the experience of the staff proposed. The Tender must ensure that, if selected, the nominated staff will be assigned as proposed. Failure to do so may result in the annulment of any acceptance of the Tenders' proposal and/ or Agreement entered into by the Client for the execution of the services</p>
19.3.5	<p>Previous experience</p>

	<p>The procedure for the evaluation of responsive Bids will be on the average of the previous three projects where the firm was involved</p> <p>The tenderer shall list in the appropriate Forms the appropriate related projects undertaken by the member firms of the tenderer within the last five (5) years.</p> <p>Evaluation of the Tenderer's position in terms of his previous experience. Emphasis will be placed on the following:</p> <ul style="list-style-type: none"> ▪ Experience in the relevant technical field ▪ Experience of contracts of similar size ▪ Some or all of the references will be contacted to obtain their input.
19.3.6	The tenderer shall provide documentation of company experience of each member of the Consortium/Joint Venture related projects.
19.3.7	<p>Financial ability to execute the contract:</p> <p>Evaluation of the Tenderer's financial ability to execute the contract. Emphasis will be placed on the following:</p> <ul style="list-style-type: none"> ▪ Proof of warrantee ▪ Contact the Tender's bank manager to assess the Tenderer's financial ability to execute the contract and the Tenderer hereby grants his consent for this purpose.
19.3.8	<p>Good standing with SA Revenue Services</p> <ul style="list-style-type: none"> ▪ The Tenderer must affix a valid SARS tax verification PIN Certificate
19.3.9	If the Tender does not meet the requirements contained in the THLM Procurement Policy, and the mentioned framework, it will be rejected by the Council, and may not subsequently be made acceptable by correction or withdrawal of the non-conforming deviation or reservation
19.3.10	<p>Penalties</p> <p>The Thembisile Hani Local Municipality will if upon investigation it is found that a preference in terms of the Act and these regulations has been obtained on a fraudulent basis, or any specified goals are not attained in the performance of the contract, on discretion of the Municipal Manager, one or more of the following penalties will be imposed:</p> <ul style="list-style-type: none"> ▪ Cancel the contract and recover all losses or damages incurred or sustained from the Tenderer. ▪ Impose a financial penalty at the discretion of Council ▪ Restrict the contractor, its shareholders and directors on obtaining any business from the Thembisile Hani Local Municipality for a period of 5 years

20	<p>The additional conditions of Tender are:</p> <p>1 Thembisile Hani Local Municipality may also request that the Tenderer provide written evidence that his financial, labour and resources are adequate for carrying out the project.</p> <p>2 The Thembisile Hani Local Municipality reserves the right to appoint a firm of chartered accountants and auditors and / or execute any other financial investigations on the financial resources of any Tenderer. The Tenderer shall provide all reasonable assistance in such investigations.</p>
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EVALUATION CRITERIA

EVALUATION SCHEDULE: BIDDING COMPANY COMPLIANCE

Bidder Compliance by the Contracting company

It must be noted that a total of **40 points** must be obtained by the Contracting Firm in relation to the requirements as mentioned on the table below failure which a tender shall be automatically eliminated from any further evaluation.

Evaluation Criteria	Evaluation Criteria	Elimination Factor	Points obtainable	Points Claimed
Delegation of Authority (Note 01)	A letter of signatory/authority authorizing the nominated person to sign the document	Yes	5	
Completing bid document (Note 02)	Must initial every page in the tender document, signing the tender document in full	Yes	5	
Company registration (Note 03)	Proof of Company Registration with Company Intellectual Property Registration Office (CIPRO) and proof of shareholding	Yes	5	
Tax Verification Pin (Note 04)	Proof of Tax Registration and Compliance with South African Revenue Service (SARS)	Yes	5	
Municipal Account (Note 05)	Attach an original or copy of a municipality utility account (not older than three (3) months) and the account must not be in	Yes	5	

	arrears for more than 90 days of any of the registered Director(s) or Company			
COIDA (Note 06)	Letter of good standing with compensation commission must be attached	Yes	5	
Accreditation Certificate (Note 07)	Proof of accreditation with the EDRMS Bodies	Yes	5	
Registration on Central Supplier's Database (Note 08)	CSD summary report not older than one month must be attached.	Yes	5	
Total 40 points				

Note 01: Delegation of Authority

In a case of a Company, a delegation of Authority signed by the Consulting Firms Board of Directors nominating a Team Leader as a delegated and authorized Signatory must be attached. In case of a Closed Corporation, a delegation of Authority signed by the Contracting Firm's majority Shareholders nominating a Team Leader as a delegated and authorized Signatory must be attached. Failure to attach the Delegation of Authority letter shall warrant an automatic elimination of tender from any further evaluation.

Note 02: Completing bid document

As stipulated in the tender rules or in addition thereto, a tender document shall be completed in full with all the provided spaces signed, every page initialed accordingly and required documentation attached. Failure to complete the document which shall warrant an automatic elimination of tender from any further evaluation.

Note 03: Company registration

A proof of company registration in the form of a copy from Company Intellectual Property Registration Office (CIPRO) shall be attached including a copy of a certificate for proof of shareholding. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 04: SARS Verification PIN

A proof of tax registration and compliance with relevant tax legislation in the form of an original tax clearance certificate shall be attached. An attached tax clearance certificate must be original and valid at the time of closing of tenders. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 05: Municipal Account Statement

Attach an original or copy of a municipality utility account (not older than three (3) months) and the account must not be in arrears for more than 90 days of any of the registered Director(s) or Company. Attach a copy lease agreement along with the utility account of the Landlord, whereby the company is

leasing the property from. Failure to attach the municipality utility account or lease agreement shall warrant an automatic elimination of tender from any further evaluation.

Note 06: COIDA

Attach proof of a valid Letter of Good Standing with COIDA issued by the Department of Labour. The attached letter must be valid at the time of closing of tenders. Failure to attach the certificate shall warrant an automatic elimination of tender from any further evaluation.

Note 07: System Development Certified Certificate

A copy of Confirmation of Certified for Electronic Document and Records Management System (EDMRS) by the company. Failure to attach the recognition certificate shall warrant an automatic elimination of tender from any further evaluation

Note 08: Registration on Central Suppliers Database

Attach a copy of the CSD Summary Report of the company which is not older than one (1) month upon closing date. Failure to attach the report shall warrant an automatic elimination of tender from any further evaluation.

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

Person Authorized to sign Tender:

FULL NAME:

SIGNATURE: DATE:

EVALUATION SCHEDULE: FUNCTIONALITY

The bidding company's responsiveness in relation to points is therefore summarized as follows:

Summary of Functionality	
Organization and Staffing, and experience of key staff	30
Methodology and Project Plan to Implement the Project	20
Experience of Firm	40
Total	90

A company must obtain a minimum of 68 points out of the 90 points above to be considered for price and evaluation on specific goals.

Organizing and Staffing (Maximum points obtainable 30)

Project Manager: *(Maximum Points obtainable 15)*

Name:

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
	B Tech / B.Com Degree in ICT / equivalent or higher	No	8	
	National Diploma in ICT/ equivalent	No	6	
Sub-total			8	
Experience of ICT PM-EDMS or in similar projects		Elimination Factor		
Years of experience in	1-3 years of experience	No	2	
	4-7 years of experience	No	5	

PM - EDMS	8 years of experience and above	No	7	
Sub-total			7	
Total			15	

Technician Leader:

(Maximum Points obtainable 8)

Name:

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
Academic Qualifications	National Diploma in ICT / equivalent or higher	No	3	
	National Higher Certificate in ICT / equivalent	No	2	
Sub-total			3	
Years of experience System Lead Technician : ICT	1 -3 years of experience	No	2	
	4 - 7 years of experience	No	3	
	8 years of experience and above	No	5	
Sub-total			5	
Total			8	

System Technician

(Maximum Points obtainable 7)

Name:

Evaluation Criteria	Minimum Required	Elimination Factor	Points obtainable	Points Claimed
Academic Qualifications	National Diploma in ICT / equivalent or higher	No	3	

	National Higher Certificate in ICT / equivalent	No	2	
Sub-total			3	
Years of experience	1 -3 years of experience	No	2	
System Lead	4 - 7 years of experience	No	3	
Technician : ICT	8 years of experience and above	No	4	
Sub-total			4	
Total			7	

ORGANISING AND STAFFING/PERSONNEL

PERSONNEL	TOTAL	SCORES
Project Manager - EDMS	15	
Technician Lead – EDMS	8	
System Technician – EDMS	7	
TOTAL	30	

TENDERER'S METHODOLOGY AND PROJECT PLAN TO IMPLEMENT THE PROJECT AND TECHNICAL PROPOSAL

The tenderer should describe briefly the process and methodology which will be followed to implement the project and provide a project plan with key milestones and timeframes. The main disciplines and roles of responsibilities must be highlighted and the technical support that will be provided on the project must be highlighted.

All documents applicable to this schedule must be attached as Attached (Annexure)

The scoring of the tenderer's quality of technical proposal will be as follows:

QUALITY OF TECHNICAL RESPONSE	Maximum Points - 20
Workflow System (15)	
No Response to the Workflow Specification	0
Poor Response to the Workflow Specification (A minimum of 49 items must be compliant)	5
Good Response to the Workflow Specification (A minimum of 64 items must be compliant)	10

Very Good Response to the Workflow Specification (A minimum of 78 items must be compliant)	13
Excellent Response to the Workflow Specification (A minimum of 97 items must be compliant)	15
Document and Records Management System (15)	
No Response to the Document/Records Management System Specification	0
Poor Response to the Document/Records Management System Specification (A minimum of 67 items must be compliant)	5
Good Response to the Document/Records Management System Specification (A minimum of 87 items must be compliant)	10
Very Good Response to the Document/Records Management System Specification (A minimum of 107 items must be compliant)	13
Excellent Response to the Document/Records Management System Specification (A minimum of 134 items must be compliant)	15

Scanning and Indexing System (10)	
No Response to Scanning and Indexing System Specification	0
Poor Response to Scanning and Indexing System Specification (A minimum of 14 items must be compliant)	2
Good Response to Scanning and Indexing System Specification (A minimum of 18 items must be compliant)	4
Very Good Response to Scanning and Indexing System Specification (A minimum of 22 items must be compliant)	8
Excellent Response to Scanning and Indexing System Specification (A minimum of 27 items must be compliant)	10

TECHNICAL REQUIREMENTS(10)	Maximum Points - 10
No Response to the Technical Specification	0
Poor Response to the Technical Specification (A minimum of 10 items must be compliant)	2
Good Response to the Technical Specification (A minimum of 12 items must be compliant)	4
Very Good Response to the Technical Specification (A minimum of 15 items must be compliant)	6
Excellent Response to the Technical Specification (A minimum of 19 items must be compliant)	10

Functional Requirements

The following table presents the functional requirements that the project's product, service or result must meet for the project objectives to be satisfied. Please indicate (Tick ✓) compliance of your product to the requirements and elaborate on how your product meets the requirements. Bidders may also refer to the relevant section in their Technical Proposal.

Workflow System	Comply	Does not Comply	Bidder's Comments
Dashboard			
1. Search for work by appropriate work criteria e.g. client number or receipt; with filters for unclaimed, claimed, ad-hoc and historical			
2. Savable searches to identify long running or old uncompleted workflow processes			
3. Work items presented, by workflow process type, is configurable to display the list selection with key criteria columns			
4. Work items presented for selection shows the number of comments added			
5. Work items presented for selection shows number of attachments			
6. Present claimed tasks to user			
7. Present claimable tasks to user			
8. User can view progress and details of any task he/she has access to, current and historical.			

9. Supervisor for a workflow can release/unlock claimed tasks			
10. Supervisor can reassign tasks			
11. User can claim a task to exclusively work on it			
12. User can un-claim (cancel) task and release back to the pool of claimable work			
13. User can add comments to a task; without claiming the task			
14. User can amend his/her own comment			
15. User can delete his/her comment			
16. User comment is only flagged as deleted, but not deleted			
17. User can add attachments to a task (documents)			
18. Added documents to a task, is filed to the document management system with configurable entity reference information (e.g. document is filed with a document type that requires the client number and optionally the work flow id).			
19. User can add ad hoc tasks to other users from a task. Ad hoc tasks are unstructured and descriptive in nature.			
20. Ad hoc tasks allow for easy viewing and navigation to the originating task			
21. User can view attachment			
22. User can replace attachment			
23. User can download attachment			
24. User can remove attachment			
25. Users have a list of processes that they are allowed to initiate.			
26. Authorized user can draw report with filters for work status(es), by period, filtered by work types, user(s) and work duration			
27. Authorized user can draw report of escalations, and long running work (duration)			
28. Authorized user can draw report on work cancellation			
29. Authorized user can draw report on unclaimed			

work			
30.The workflow reporting can draw historical reports			
31.The workflow reporting tool is extensible			
Workflow Model/Form Designer			
32. Model is BPMN compliant			
33.Model Designer is browser based			
34.Model Designer is desktop based			
35.Model designer uses GUI based dragging and dropping of workflow activities			
36.Scripting supported for expressions and service tasks			
37.Form designer uses GUI based dragging and dropping of widgets			
38.Forms can be designed to span multiple pages			
39.Scripting supported by form designer			
40.Form designer can retrieve information via REST calls			
41.Provide a walk through with screenshots of how a workflow is defined			
42.Provide screenshots of the form designer with a designed form			
43.List all controls/widgets exposed by the form designer			
44.Explain the workflow process deployment detail			
45.Explain the workflow process deployment constraints, specific to redeploying existing workflows			
46.Model Designer support pools			
47.Model Designer support lanes			
48.Model Designer support text annotations			
49.Model Designer support collaborative diagrams			
50.Model Designer can print diagram			
51.Model Designer can export diagram to SVG or PNG			
52.Form Designer can print form			
53.Form Designer can export form to SVG or PNG			
54.Designer support documentation/comments on all workflow elements			
Workflow Engine			
55.Support parallel execution of activities in the same workflow process with synchronized convergence			
56.Support alternate path execution			
57.Support multiple divergence to multiple paths			

58. Support conditional sequence flow (with guard condition)			
59. Support uncontrolled sequence flow (without guard condition)			
60. Support default sequence flow			
61. Support sequence flow looping			
62. Support exception flow using error events			
63. Support compensation event			
64. Support terminate event			
65. Support timer/schedule based events			
66. Support sequential multi-instances of task			
67. Support sequential multi-instances of process			
68. Provide task to execute SQL via compatible and relevant middleware and to handle response			
69. Provide task to make REST request and to handle response			
70. Provide task to make WSDL request and to handle response			
71. Provide task to map, transform and store JSON data object			
72. Provide task to map, transform and store XML data object			
73. Provide task to run configurable script			
74. Support starting additional workflows by signaling an event			
75. Support sending data object(s) with an event			
76. User task (e.g. form) can be configured to specific user			
77. Has standard service task for sending email			
78. User task can be configured to group			
79. User task can be configured to specific user or group			
80. Process state is carried by data objects			
81. Support sub-processes			
82. Configurable support for sending email to a user on a pending task with a link to the task			
83. The engine is extensible by custom service tasks			

Messaging			
84.Integrates with ActiveMQ/Artemis			
85.Integrates with MSMQ			
86.Integrates with Kafka			
87.Integrates with RabbitMQ			
88.Supports native messages. Please explain the options to consume messages as events to the workflow. If any native messaging supported, explain the options to send messages via the workflow			
Workflow/Lifecycle			
89.Sends email with customizable email template when user activates			
90.Sends email with customizable email template when user registers (first activation)			
91.Sends email with customizable email template when user is disabled			
92.Sends email with customizable email template when user is locked out			
93.Sends optional (configured) email with customizable email template when user logs in			
94.Sends email with customization email on password reset and MFA reset			
95.GUI Ability to configure the option to send/not send email to the user when he/she logs in			
96.All workflow customization available using the Administrative Interface			
97.Lifecycle support registration			

DOCUMENT MANAGEMENT SYSTEM			
	Comply	Does not Comply	Bidder's Comments
Document Storage			
1. Stored documents are encrypted			
2. Stored documents can be configured as encrypted based on document type			
3. If applicable, explain encryption 'password' determination			
4. A stored document is never overwritten by un update			
5. A stored document will be versioned on update			

6.	Old versions are accessible			
7.	It is possible to revert to an old version			
8.	Reverting to an old version does not delete the current version			
9.	It is possible to mark a record for deletion, which excludes it from "normal" searches			
10.	It is possible to search for deleted documents			
11.	Stored document has a document type			
12.	Stored document has a tampering hash			
13.	A document type can be configured to only allow certain file types			
14.	Full text indexing and searching of document content available			
15.	Full text indexing and searching of document content configurable by document types			
16.	Full text indexing and searching of document content configuration by file type			
17.	Full text indexing and searching available for document type attributes			
18.	Documents can be arranged by folder/path			
19.	Documents can be arranged/indexed by tags			
Document Type Attributes (Document Type attributes is a meta-model describing the necessary data that has to accompany a document of a specific type.)				
20.	An attribute model can be defined per document type			
21.	The attribute model contains mandatory and optional items			
22.	The attribute model contains attributes of different types			
23.	Indexed searches available by any of the attribute model items			
Reporting				
24.	Report on			

storage use by file type			
25. Report on storage use by user			
26. Report on storage use by document type			
27. Report to identify min, max, standard deviation and average of file sizes per file type			
28. Report on historical file storage use and storage available			
29. Report on documents with custom permissions (other than that allowed by document type)			
30. Report on unexpired share links			
Document Management Security			
31. A document and/or the attributes will only be allowed if the intended user has the required permissions			
32. Many users or user groups can be given different access levels to a document type			
33. Many users or user groups can be given different access levels to a particular document			
34. Document access can be restricted to queries			
35. Document access can be restricted to download			
36. Document access can be restricted to creating a document of type			
37. Document access can be restricted to updating a document of type			
38. Able to disable certain file types globally			
39. Ability to share documents via link			
40. Document share links can be password protected			
41. Document share links can have an expiration date			
42. The document storage engine contains content disarm and reconstruction technology			
43. The document storage engine can be integrated to content disarm and reconstruction technology			

44.	The document storage engine be integrated to anti-virus			
45.	The document storage is integrated to anti-virus			
Interface				
<i>User Role:</i>				
46.	Able to include document type as search criteria			
47.	Able to include user as search criteria			
48.	Able to include any combination of document attributes			
49.	Able to include full text in search criteria			
50.	Able to render preview of documents			
51.	Able to view document			
52.	Able to view versions			
53.	Able to revert to version			
54.	Able to amend attributes			
55.	Interface can render thumbnails/previews			
<i>Administrator Role:</i>				
56.	Able to define document type			
57.	Able to define attributes			
58.	Able to assign attributes to document type			
59.	Able to define and assign groups, with specific permissions to document type			
60.	Able to define allowed file types per document type			
61.	Able to configure global non-allowed file type list			
Pruning/Compliance				
62.	Prune stored documents and based on age and content type and attribute data			
63.	Prune database on age and content type and attribute data			
64.	Option to archive			

the deleted documents			
Logs / Audit Information			
65. A full log is kept of all user (via API or interface) activity for all functions			
66. Excessive downloading can be defined and identified by an administrator			
67. Every document create and update contains necessary timestamps and user information			
Integration			
68. Integrates with Email system (Exchange)			
69. The Document Management integrates with other relevant Municipal Systems such as Client Relationship Management system(s).			

Records Management			
	Comply	Does not Comply	Bidder's Comments
70. Incoming correspondence handling			
71. Outgoing correspondence handling			
72. Role-based system access			
73. Automatic indexing of correspondence			
74. Assigning of correspondence received to various departments/units/individuals for auctioning			
75. Real-time monitoring of correspondence status			
76. Electronic file plan in line with regulations			
77. Ability to mark files as confidential/secret			

78.Automatic date based document management (archival, destruction, file plan)			
79.Circulation of items to Directorates for comments within a certain timeframe			
80.Putting page number on the document on circulation			
81.Automatic SMS notification for correspondences receive			
82.Audit Trail Capabilities			
Meeting Management			
83.Video conferencing			
84.Schedule of meetings / council meeting itinerary			
85.Electronic submission and approval of leave of absence by Councillors and members.			
86.Council item			
87.Notice of meeting			
88.Compile meeting agenda and electronic distribution of same			
89.Meeting and Organisational calendar			
90.Attendance registers per meeting			
91.Declaration of interest per meeting			
92.Recording of Meetings			
93.Meeting Minutes			
94.Capturing of Council resolutions			

95.Putting page number on the document on circulation			
96.Meeting sharing			
97.Document sharing			
98.Collaboration capabilities			
99.Linked Resolution Register			
100.Solution includes Automated Notifications			
101.Solution must include all Council items and resolutions from 1946			
102.Approval and Authorization			
103.Electronic Signature			
104.Institution			
Contract Management			
105.Commitment to Completion The systematic approach of enterprise contract management system with authorization, review and approval.			
106.Document Management All documents can be stored in the system directly and made available on demand.			
107.Better Track of Contracts Track contracts with analytics, reports and actively logs.			
108.Alerts for Renewal Date Raise alert notifications when the contract is about to expire.			
109.Audit Preparation View the history of contracts and prepare them for audit to ensure compliance.			

110.Increase Visibility Storing all the contract files on a single centralized platform increases the visibility.			
111.Approval Times Automate the contract process to increase efficiency and decrease approval times.			
112.Risk Reduction Identification of contracts that require immediate attention.			
113.Improved Forecasting Provides Analytics and reporting including forecasting.			
114.Accessibility Accessible online from anywhere, anytime.			
115.Reliable Search Search the key contracts with custom search without needing to go through each contract individually			
116.Security Contract security can be defined based on access control so that only authorized users.			
117.Business Insights The tracking and reporting features of an enterprise contract management system enable automated reports and provide actionable business intelligence to improve processes and ensure that best contract management practices are adopted.			
118.Contract Stages A contract management system shows the exact stage contract is in			
119.Contract Classification Contracts can be categorized according to their type.			
120.Business Projections With the status of all the contracts in view, projections for future.			
121.Reporting Reporting options system allow to determine the performance the overall status of the contracts.			
122.Real-time information All the information is available on real-time.			
123.Increased Analytics Analyse spending with reporting and analytics.			

124.Prevent Unplanned Renewals Automatically upon expiration and alert notifications point out expiring contracts.			
125.Contract History History of all the agreements made during the contract lifecycle.			
126.Reminders Integrate with Outlook to remind you of important upcoming tasks via email.			
127.Easy Configuration Configured according to departments, users, roles and permission schemes.			
128.Self Service Import Self service import through which employees can import the already existing contracts into the system			
129.Analyse Progress The progress of the contracts can be analysed regularly with real-time information.			
130. Analyse Progress The progress of the contracts can be analysed regularly with real-time information.			
131.Stored document has a document type			
132.Stored document has a tampering hash			
133.A document type can be configured to only allow certain file types			
134.Full text indexing and searching of document content available			

Scanning and Indexing System			
	Comply	Does not Comply	Bidder's Comments
Scanning			
1. Integrated scanning and indexing solution			
2. Scanning multiple documents with page separator			
3. Scanning supports PDF and TIFF			
4. Scanning done at a minimum of 300 DPI			
5. Scanning differentiates between users at same scanning desk			
6. Scanning supports bar code			
7. Scanning supports OCR to Word and PDF with option for scanning to either or both.			
8. Scanning support to selected box number folder			
9. Scanning support to selected document type folder			
10. Specify PDF Scanning version			
11. Specify PDF Image embedding supported			
12. Specific PDF Browser compatibility requirements			
13. Scanning supports document and document group dividers and scanning to a group folder			
Indexing			
14. Able to create workflow with attachments of document, where the documents are indexed to the document			

management system with the appropriate attributes.			
15. Can enter and populate attributes for document type including date created, scanner device, indexing person, box/file number			
16. Can start work to the workflow management system with multiple scans as attachments to the work			
17. Can auto populate document type by bar code			
18. Can view scans while indexing			
19. Can add multiple scans as attachments to a single indexing function			
20. Auto archive of scans that are indexed			
21. Auto remove scan archives old than a configured number of days			
22. Before indexing, rotate documents/pages			
23. Before indexing, split documents/pages			
24. Before indexing, merge documents/pages			
25. Before indexing, reorder pages			
26. Before indexing, move documents/pages to different context folder			
27. Upon indexing, advise the user of similar workflow and documents			

Technical Requirements

The following table presents the technical requirements that both systems must meet. Please Tick (✓) to indicate compliance to the requirement and elaborate on how the systems meets the requirements in the Bidder's Comments column. Bidders may also refer to the relevant sections in their Technical Proposal.

NB. Tick **Does not Comply** if one or more of the systems under consideration does not comply with the requirement.

Tick **Fully Comply** if all the systems under consideration comply with the requirement.

• System	Workflow	Fully Comply	Does not Comply	Bidder's Comments
• Records Management System	Document and Scanning and Indexing System			
Identification and Session				
1. Solution support Authentication via Active Directory • Specify any extraordinary Active Directory or Identity needs if applicable				
2. Solution support Authentication via OIDC/SAML				
3. Solution support Authority via Active Directory (The groups the user participates in.)				
4. Solution support Authority via Claims (The groups the user participates in.) • Elaborate on OIDC, SAML support.				
5. Solution support configurable session timeout				
Client Software Deployment				
6. Application(s) available by browser • Specify required browsers and versions				
7. Application(s) installed to desktop. • Specify required desktop operating systems supported and minimum required version if applicable • Specify desktop dependencies/toolkits required for installation if applicable				
8. Application(s) installed to mobile.				

<ul style="list-style-type: none"> System Document and Records Management System Scanning and Indexing System 	Workflow	Fully Comply	Does not Comply	Bidder's Comments
<ul style="list-style-type: none"> Specify compatible mobile platforms Specify mobile store deployment plan/responsibility 				
<p>The Tenderer must provide the following environments:</p> <ul style="list-style-type: none"> Development Environment User Acceptance Environment Production Environment 				
APIs				
<p>9. Server components expose API.</p> <ul style="list-style-type: none"> Describe API access method (E.g. JSON Rest over HTTPs via API Key) Describe API security (E.g. Bearer Token, Basic Auth) Describe API non-coverage of the functionality exposed (include percentage coverage) 				
Performance				
<p>10. The proposed solution conforms to international best practice for the response times to a transactional function under maximum concurrency</p>				
<p>11. The solution conforms to international best practice response times when creating reports online and in real-time.</p>				
<p>12. All long running items reflect progress</p>				
<p>13. All API queries will, from received request to response, take sub-seconds to complete</p>				
Monitoring				
<p>14. Uptime information is readily available and current</p>				
<p>15. Email/notification s are sent to administrators if service is down</p>				

<ul style="list-style-type: none"> • Workflow System • Document and Records Management System • Scanning and Indexing System 	Fully Comply	Does not Comply	Bidder's Comments	
Documentation				
16. Online help is available for API				
17. Online help is available for software functions				
18. Online context sensitive help is available for software				

Technical Proposal

The Bidder is to include a Technical Proposal that outlines the proposed solutions. The Technical Proposal and supporting documentation must not exceed 30 pages. The Technical Proposal must follow the format below:

A Methodology

Bidders must outline the methodology/approach to be used implement the solution including the training approach.

B Resource Plan

Bidders must provide a Resource Plan and Project Organisation should include provided.

C Project Plan

Bidders must provide a project plan which includes timelines, resources and milestones.

D Solution Description

The Bidder is to include information on the following solutions/systems:

- Workflow
- Document Management
- Records Management
- Scanning and Indexing

For each of the above systems, the bidder should provide a high level description of the proposed solution, a detailed solution design/architecture. In addition, the bidder should provide information on how the above systems integrate with each other.

E Support and Maintenance

Bidders must outline how they will support and maintain the system and include a sample SLA

F Training and Skills Transfer

Bidders must outline their Training and Skills Transfer approach

I the undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise, confirms that the contents of this schedule are within my personal knowledge and are to the best of my belief both true and correct.

SIGNED AT	AUTHORIZED SIGNATURE (UNDERSIGNED)
DATE	NAME AND CAPACITY

TENDERER'S METHODOLOGY AND PROJECT PLAN TO IMPLEMENT THE PROJECT AND TECHNICAL PROPOSAL

The tenderer should describe briefly the process and methodology which will be followed to implement the project and provide a project plan with key milestones and timeframes. The main disciplines and roles of responsibilities must be highlighted and the technical support that will be provided on the project must be highlighted.

All documents applicable to this schedule must be attached as Annexure

Methodology and Project Plan to Implement the Project (Maximum Points obtainable 20)

Evaluation Criteria	Elimination Factor	Points obtainable	Points Claimed
Project Execution (Business Requirement, Solution Design and Solution Building/Configuration)	No	10	
Project Management, Process Mapping, Data migration and Systems Integration Test (SIT)	No	5	
Post Implementation Support / Stabilisation, Solution Delivery / Deployment, Training and UAT Support	No	5	
Total		20	

EXPERIENCE OF COMPANY (Maximum Points obtainable 40)

Note: Company's previous completed projects

Provide proof of the company's previous completed projects which is in the form of verifiable appointment letters / orders issued and reference letters with contact details. If these are not provided, zero points will be allocated in that regard.

Evaluation Criteria	Evaluation Criteria	Elimination Factor	Points obtainable	Points Claimed
Company experience in terms of projects completed	1- 3 Projects	No	10	
	4 – 7 Projects	No	30	
	8 and Above	No	40	
Sub-Total			40	
TOTAL			40	

TOTAL: _____/90

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