

## Logistics Management Solution Scope of Work

### 1. GLOSSARY OF TERMS / DEFINITIONS AND ABBREVIATIONS

Term	Definition
Business Rule	A business rule is a rule that defines or constrains some aspect of business and always resolves to either true or false. Business rules are intended to assert business structure or to control or influence the behaviour of the business. Business rules describe the operations, definitions and constraints that apply to an organization. Business rules can apply to people, processes, corporate behaviour and computing systems in an organization, and are put in place to help the organization achieve its goals.
Notification	A notification is a message, sound, or symbol on your phone or computer telling you that someone has sent you a message that requires attention and action.
Request for (RFT)Transport	An official record on the Logistics Management System with a reference number that indicates that a transport notification has been authorised and is being actioned.
Empty Leg	Empty leg applies when a driver has travelled a long distance to deliver and does not have the return load back to the depot where he would be granted the empty leg of 620 km by 6–10-ton rate back to JHB.
ERI	Eskom Rotek Industries
POD	Proof of Delivery
POC	Proof of Collection
LMS	Logistics Management System
GIS	Geographic Information System
PO	Purchase Order
KM	Kilometers
RFP	Request for Proposal
EAAB	Enterprise Architecture Advisory Board
ICOE	Integration Centre of Excellence
SOA	Statement of Architecture
EA	Enterprise Architect
CIM	Common Information Model
SVN	Subversion
SIT	System Integration Testing
ALM	Application Lifecycle Model
DR	Disaster Recovery
CRMC	Change Review Management Committee
API's	Application Programming Interface
SDLC	Software Delivery Life Cycle
QA	Quality Assurance
PPD	Pre-Production Development

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Term	Definition
UAT	User Acceptance Testing
E2E	End 2 End
T&C's	Terms and Conditions
POPIA	Protection of Personal Information Act

## BUSINESS REQUIREMENTS SPECIFICATION FOCUS:

Logistics Services, a division of Eskom Rotek Industries, offers road transport, materials handling, warehousing, and road logistics services. These include the transportation of boilers and turbines to and from power stations, transformers and switchgear from substations, poles and pylons to remote sites, as well as all power generation and distribution equipment.

Eskom Rotek Industries (ERI) seeks to implement a cloud-based Logistics Management System to align with Eskom Group IT Cloud adoption strategic objectives, with improved functionality supported by an industry specific best practice framework. The envisaged system should fulfill the below listed high-level requirements:

A centralized system to receive notifications and enable the creation of new Requests for Transport (RFT's)

View and update transport notifications

Track and Trace RFT's

Capture Quotations and contract details

Create Transport Manifests

Capture Waybills

Integration to existing Eskom systems

Book stock into and out of the warehouse

Create pick tickets

Reporting

Upload and download of supporting documentation

Mobility and workflow

## Detailed requirements and Business rules:

Functionality grouping	Functionality	Business Rule No and Description
Authorise notifications	The Client Liaison must be able to receive and view all notifications for transport requests.	Authorise only those notifications where funds are available to execute the transport request.
Request for Transport (RFT)	<ul style="list-style-type: none"> <li>• Capture new RFT details</li> <li>• Search existing RFT</li> <li>• View RFT status</li> <li>• Update existing RFT</li> <li>• Upload/download supporting documents</li> </ul>	

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Functionality grouping	Functionality	Business Rule No and Description
	<ul style="list-style-type: none"> <li>Close RFT</li> </ul>	
Quotations	Generate quotation: Automatically calculate Freight Charge and/or Sundry Charge  (Built-in GIS capability required) (Built in-Item Built in-Vehicle	0-450 km standard daily charge rates applicable. 450 km + system should charge per km travelled
	Update Quotation	
	View quote status	
	Print quotation	
	Bulk upload/download supporting documents	
	Authorise Quotation (Built-in workflow)	The Operations Manager must verify if the client has been billed correctly and approve accordingly.
Waybills	Capture Waybill items:	Waybills may be linked to multiple RFT's for optimal scheduling of the vehicles
Manifests	<ul style="list-style-type: none"> <li>The system must have the ability to capture manifest details</li> <li>The system must display the subcontractor vehicles that are available for delivery and collection</li> <li>The system must also display the location of the subcontractor vehicles that are available for delivery and collection.</li> </ul>	Manifest may be linked multiple RTF's optimal scheduling of the vehicles The manifests allocated to a subcontractor will be managed in the Logistics Management System.
Brief/Debrief checklist	Electronically capture Brief and Debrief checklist details (Built-in workflow)	The form sections must be divided based on the workflow stages of the process i.e. brief section to be completed only when driver goes to deliver, debrief section when driver has completed all deliveries.
	Enable electronic signature on the brief/debrief checklist (Built-in workflow)	The controller and driver must verify that all deliveries have been completed accordingly and the driver must sign the debrief as acknowledgment of being briefed and debriefed.
Invoice	Generate invoice	Mandatory supporting documents required:  Proof of Delivery (POD), Proof of Collection (POC), Supplier Notification, Transport manifest, Brief/Debrief sheet and charge sheet all completed and signed off.

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Functionality grouping	Functionality	Business Rule No and Description
Warehousing	Book stock into and out of the warehouse	
Infrastructure	Upgrade of existing IT and OT infrastructure to enable remote support of handheld devices to fast track some of the processes i.e. amending an RFT at the collection site.	<ul style="list-style-type: none"> <li>• System maintenance and support post implementation</li> <li>• Logistics Management system training: Vendor to provide</li> </ul>
Automatic Information Capture	Ability to capture all information including documentation required to rate the collection and delivery work directly on the LMS. i.e. (POD, POC, Manifest, etc. to reduce turnaround times for invoicing	
Status Confirmation	The ability to view the status of the deliveries and the collections e.g. <ul style="list-style-type: none"> <li>• Collected/dispatched</li> <li>• Delivered</li> <li>• Received etc</li> </ul>	

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## **Information/data requirements:**

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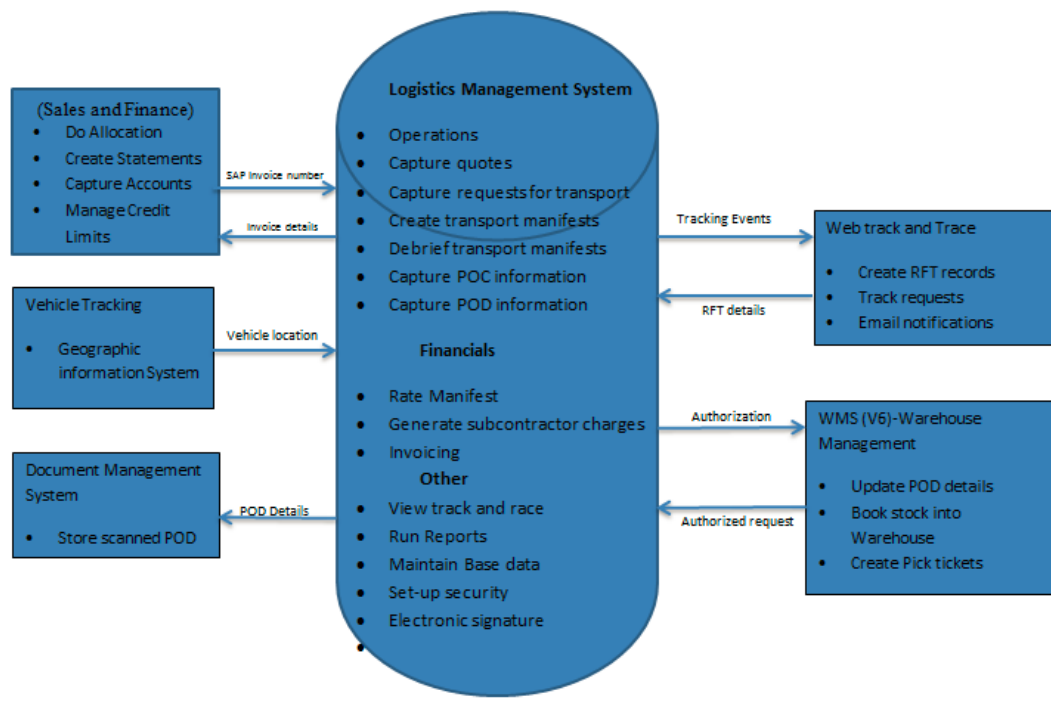
Classification of data / information	Data / Information type	Availability of data
Notification details	<ul style="list-style-type: none"> <li>Email</li> </ul>	Yes
RFT details	<ul style="list-style-type: none"> <li>Transport PO Number</li> <li>Service Type</li> <li>Collection site</li> <li>Collection contact details</li> <li>Delivery site</li> <li>Delivery contact details</li> <li>Comments</li> <li>Collection date</li> <li>Delivery date</li> <li>Item information</li> <li>Supplier document number</li> <li>RTF reference number</li> </ul>	Yes
Contract details	<ul style="list-style-type: none"> <li>Contract number</li> <li>Contract Description</li> <li>Contract Effective date</li> <li>Cease Date</li> </ul>	Yes
Quotation details	<ul style="list-style-type: none"> <li>Quote items</li> <li>Description of a Product</li> <li>Product code</li> <li>Load requirements</li> <li>Quantity specifications</li> <li>Resources</li> <li>Duration of resource usage</li> <li>Notification number</li> </ul>	Yes
Waybill details	<ul style="list-style-type: none"> <li>Consignment type</li> <li>Route</li> <li>Vehicle</li> <li>Driver</li> <li>Trip Date and Time</li> <li>Start Odometer Reading</li> <li>End odometer reading</li> <li>Service type</li> </ul>	Yes
Brief/Debrief Checklist	Driver check-list template	Yes
Manifest	Rates (0-450 daily rate) or KM (whichever is the highest) Resources- (crane hours Labour accommodation, standing time etc)	Yes

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## Data flow diagram OR Context diagram:



## REPORTING REQUIREMENTS:

Efficiency report: An efficiency report is created and updated in excel to monitor the controllers outstanding manifests. This report is used in the daily meetings.

Report to reflect:

Manifest Date, Manifest number, Controller, Supplier, Destination, vehicle, driver, Subcontractor, Material description, PO number, Current OPS Status, Current Financial Status, POC Number, POC Date, POC Comments, POD number, POD Date, POD Comments

Report Filters:

Date range, Controller, Manifest number, OPS status, Financial Status

Operations Financial Report: A report that reflects data for the financial staff.

The Report to reflect:

Manifest Date, Manifest number, Ops verify date, Ops verify user, Financial Verify date, financial verify user, Invoice number, invoice date, DMR number

Report Filters:

Date Range, User, Manifest number

Subcontractor Charges report: A report to reflect the costs captured on the actual cost and payment screen. This will also be used as a recon sheet after capturing has been done to ensure the costs are captured and captured correctly.

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The Report to reflect:

Manifest number, Subcontractor, Captured Date, captured by, Subcontractor Invoice Number, Subcontractor invoice Date, Estimated amount, actual amount, Column with space for a Tick when used as a recon sheet, SAP Migo Number, Paid indicator, Comments

Report Filters:

Date Range, Manifest number, User, Subcontractor

### **User interface requirements:**

The user interface must support the following requirements:

- User Friendly and support easy navigation
- Landing/home page with quick link to specific module functionality
- Include user guide and or help function in the home page
- Provide quick search functionality and Frequently Asked Questions (FAQ)
- Capture search history of frequently used sites

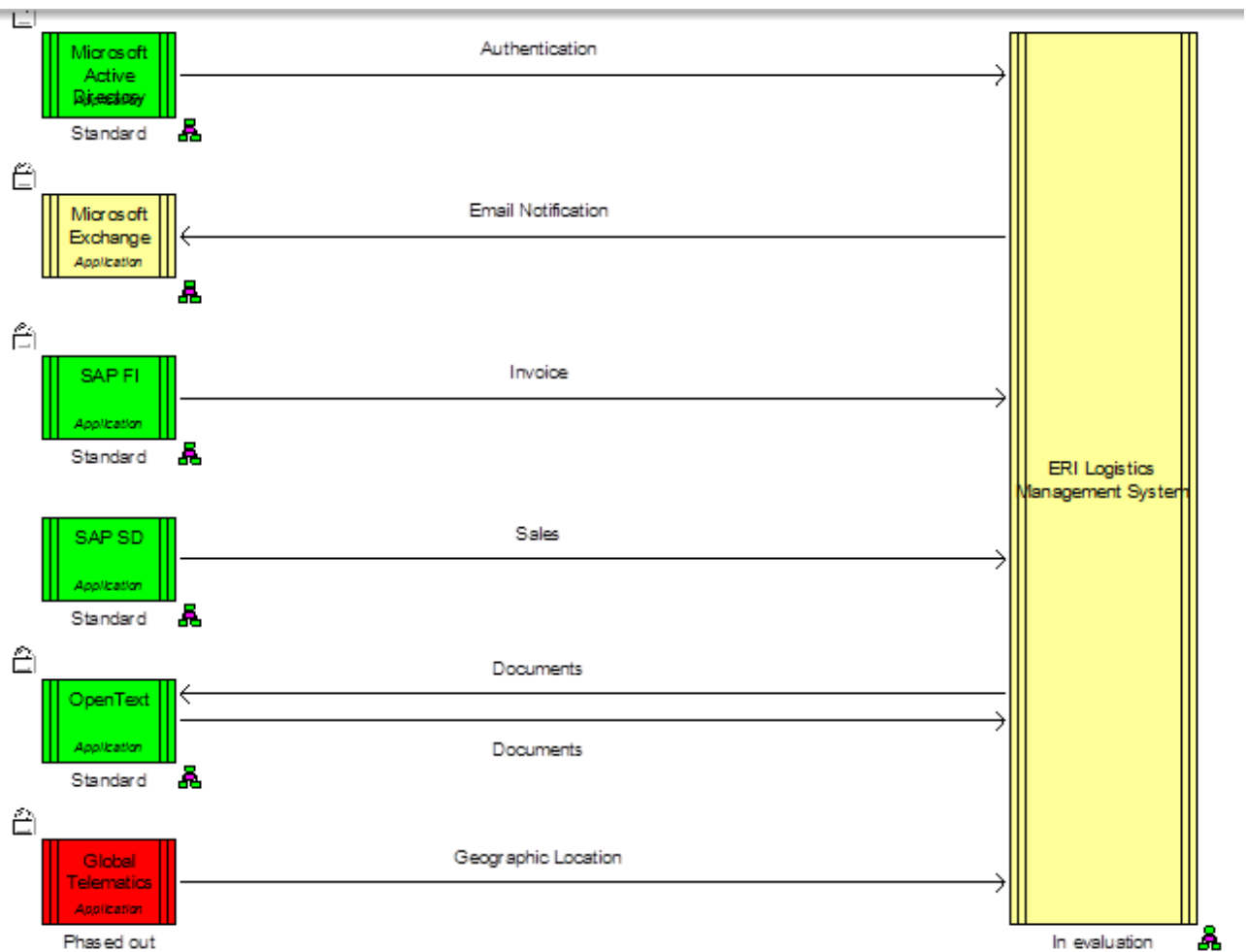
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## System Integration requirements:



## Integration and Testing requirements

Integration to Microsoft Azure	Microsoft Azure will be used authentication of users to gain access to the system.
Integration to Microsoft Exchange Online	The Client Liaison will receive and view notifications for transport requests on their emails.
Integration to SAP FI	Invoicing
Integration to SAP SD	Sales
Integration to OpenText	The Logistics Management System should interface with OpenText. Data has to be migrated from eDocs (the previous document management system) to OpenText.
Integration to Global Telematics/ Pointer	This will be used for vehicle tracking

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## Technical Requirements

Deliverable	Description
<b>Functional Specifications and Detailed Design</b>	Deliver approved Functional Specifications and Detailed (Physical) design based on the User Requirement Specification and Logical Design provided as part of this RFP.
	Facilitate review and approval of the design as required by Eskom methodology and governance. Ensure cyber security compliance and integration end points. The Tenderer is required to render solution architect services to this project which includes making sure that Enterprise Architecture Advisory Board (EAAB) approval is gained before build and again before go-live.
<b>Integration</b>	Integration into these systems will be critical for the success of the Logistics Management project. Integration scope and deliverables is listed below:
	<ul style="list-style-type: none"> <li>Analyse, design, develop, test and deploy integration solutions.</li> <li>The solution should be able to integrate to any systems that Eskom and ERI and may need to integrate to. Refer to the logical design for systems that must integrate to the solution:</li> <li>External interfaces to integrate using Oracle Fusion 12c and IBM WebSphere (Data Power), thus the vendor should be well skilled to work with the mentioned technologies.</li> <li>The Integration Centre of Excellence (ICOE) governance process must be followed for all approvals. Kindly reference "SOA Workgroup artefacts".</li> <li>All diagrams and processes are to be captured in the Eskom Enterprise Architect (EA). Configuration Management should be able to integrate with all specified applications as mentioned in the logical design, conforming to the "End system integration design requirements".</li> <li>All CIM message artefacts (including Mapping Document) to be placed in the Eskom defined CIM SVN.</li> <li>All code to be placed in Eskom defined Code SVN repository</li> <li>All artefacts to be placed in the ERI share point.</li> </ul>

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	<p>The following are the integration and Testing activities and artefacts to be produced and presented at the committee for approval and sign off:</p> <ul style="list-style-type: none"> <li>• Business test case document.</li> <li>• Integration specification document.</li> <li>• Mapping Document.</li> <li>• CIM message artefacts including WSDL's and XSD's.</li> <li>• Code and unit testing review.</li> <li>• Deployment Guide.</li> <li>• SIT testing review of results in HP ALM.</li> <li>• SIT test case sign-off.</li> <li>• Performance testing review of results in HP ALM (if performance testing is required).</li> <li>• Performance testing sign-off.</li> <li>• Pre-transfer documents for go-live approval.</li> <li>• Test requirements in HP ALM</li> <li>• Test cases and results in HP ALM</li> <li>• Defects managed in ALM</li> <li>• Test plan Document</li> <li>• Non-functional Test plan document</li> <li>• Test closure reports documents</li> <li>• Performance test scripts and results.</li> </ul>
	<p>Provide an Integration message modeller to complete the following:</p> <ul style="list-style-type: none"> <li>• Analysis of message requirements.</li> <li>• Model or update integration message which follow a Common information model.</li> <li>• Create payloads and envelopes.</li> <li>• Generate xsd, message model and model dictionary.</li> </ul>
<b>Build and deploy</b>	<p>Provide test cases, Unit Testing on the Development (DEV) environment, deploy base solution to the Development, Quality Assurance, Pre-Production, Production, and Disaster Recovery (DR) environments prior to go-live.</p>
	<p>Update requirements traceability matrix. Ensure all environments are updated following successful test conclusion. Compile go-live plan. Ensure the solution obtains the necessary governance approvals:</p> <ul style="list-style-type: none"> <li>• Enterprise Architecture Advisory Board (EAAB) for pre-transfer, Change Review Management Committee (CRMC), Go/No-Go pack and decision by Group IT General Manager and Data take-on and Go-Live in the production (PROD) environment.</li> <li>• Code to be checked into Eskom's code repository.</li> <li>• Any development or APIs exposed outside the integration platform will be developed using Eskom software development technology standards such as .NET technologies, JAVA, Python.</li> </ul>

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<b>Test</b>	Complete System Integration Testing on the Quality Assurance and Pre-Production (QA and PPD) environment and test closure report. Complete User Acceptance Testing (UAT) on the Pre-Production (PPD) environment and test closure report.
	Complete Performance Testing on the Pre-Production (PPD) environment and test closure report. Complete Disaster Recovery Testing on the Disaster Recovery (DR) environment and complete and Vulnerability Testing.
	<p>The tenderer must provide an experienced test manager, and sufficient dedicated testers must be allocated to the project, independent of the development team. The testing staff may not be the same staff as the configuration, development and implementation team. The testing team is responsible to:</p> <ul style="list-style-type: none"> <li>• Acquire the testing requirements, develop the test cases, and conduct testing to ensure that the solution is comprehensively evaluated for implementation in the Eskom IT environment.</li> <li>• All Test Analysis (Test Requirements), Test Design (Test Cases and Test Scenarios), Test Execution and defect management must be done in ALM, in line with the Eskom's Testing Standard.</li> <li>• Performance testing must be done using LoadRunner</li> <li>• All functional and Non-functional test assets to reside in ALM</li> <li>• Testing requirements must cover all identified interfaces where applicable</li> <li>• The testing team must adhere to the TCoE Turnkey Project Requirements Guideline to be provided as part of the RFP document. The following testing and testing milestones must be completed. A signed off test closure report is required before a test milestone is completed.</li> <li>• Unit Testing – test results from the Vendor team.</li> <li>• System Integrated Testing, Functionality testing (in QA – end to end functional testing and integration testing. That means testing with other systems and ensuring that all requirements have been successfully configured). This testing must be driven &amp; executed by the Vendor but must include Eskom staff for completeness &amp; authenticity.</li> <li>• Non-Functional Testing (performance testing and disaster recovery testing). This testing must be driven &amp; executed by the Vendor but must include Eskom staff for completeness &amp; authenticity.</li> <li>• User Acceptance Testing (Testing by the ERI customer team that the system is working and meets requirements). This testing must be driven by the Vendor but must be executed by ERI staff for completeness &amp; authenticity</li> </ul>
<b>Training/Transfer of skills</b>	Training and skill transfer is required for the ERI and Eskom development, Database, Application Technical Support and Support teams who need to be developed and skilled within a short period, to be able to continue with on-going

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	changes and updates of the Social Media Channel in support of on-going business requirements and changes.
	Develop training material and support material. Train ERI and Eskom development, Database, Application Technical Support and Support teams and ensure sufficient knowledge transfer.
	Skill and knowledge transfer will be included as part of deliverable sign-off. The requirement for training will be at all Eskom levels of functional application support, 1st line support, 2nd line, and 3rd line of support, including the Application Technical Support and Database Support. The service provider will then be expected to provide 4th line support services.
	All the levels will require a minimum of two internal ERI and Eskom resources unless communicated otherwise. The vendor will be required to sign-off knowledge transfer acceptance certificate as part of every deliverable to ensure knowledge is transferred throughout the process and does not need to wait until the end of the project.
<b>Stabilise and handover</b>	Ensure adoption and good performance of the solution. Provide support to stabilise the solution. Conclude handover to business. Conclude handover to support. Close-out the project.
<b>Active SMS and Email Monitoring</b>	Design, Develop and Deploy a high availability monitoring platform for the system to be made available and accessible to both the ERI and Eskom internal support personnel and well as the Vendor Support resources. All monitoring related skills and knowledge to be packaged and handed over to ERI and Eskom support during the stabilization and handover phase of the project.
<b>Project Management</b>	Deliver project documentation required by the ERI Project Team. This includes but is not limited to: <ul style="list-style-type: none"> <li>Detailed integrated schedule. Weekly progress reports. Payment schedule forecast and actuals tracking against it. Delivery Acceptance Certificates with supporting approved test details. Cross Functional Team and Contracts Management team members in order to facilitate governance of the project and its deliverables. Integrate the current application support teams into the project delivery team. Deliverable Breakdown Structure indicating all fixed cost deliverables with the cost of each deliverable and the total cost of all deliverables.</li> </ul>
	<ul style="list-style-type: none"> <li>List of deliverables and responsibilities that the tenderer view as being excluded from their scope of delivery. Payment schedule for all deliverables in the Deliverable Breakdown Structure. A payment schedule must be provided for all deliverables on a fixed-cost basis. During execution deliverables will be evaluated by ERI Cross Functional Team and Contracts Management Team and a Deliverable Acceptance Certificate issued when approved. Approved deliverables can then be</li> </ul>

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	invoiced. Projected monthly cash flow. Summarise the payment schedule provided per month.
	<ul style="list-style-type: none"> <li>A Project schedule in MS Project format that contain all costed deliverables as milestones and also include activities to deliver such milestones. The top-level work breakdown in the schedule must reflect the Software Delivery Life Cycle (SDLC) stages (Design; Build, Test, Train, Deploy, Stabilise – after go-live support).</li> </ul>
<b>Other Responsibilities</b>	Dependencies and pre-requisites on ERI must be clearly stipulated. Total man-hours and skill of all Tenderer resources combined. An organogram and a list of all the team members of the Tenderer that will deliver the proposed project including the following information for each and every team member:
	<ul style="list-style-type: none"> <li>Name and surname, Confirmation that person is a current employee of the Tenderer. Role of person on the proposed team, Description of Education with supporting certificates as proof. Relevant Experience and Skills. Relevant product certification/s achieved with supporting certificates as proof.</li> </ul>
	Explanation of tenderer's experience on ERI's current environment where relevant and motivation why tenderer is best positioned to deliver on this project. Indicate all other pre-requisites and, or exclusions that must be addressed before the start of the project with clear timelines.
	All deliverables produced on this contract shall become the property of ERI- Logistic Services holding sole rights to it. All deliverables shall be provided in maintainable format for each evaluation (i.e. editable documents; source code and scripts).
	Project change control refers to the changes in project Scope, Time and Cost. Changes will follow the process below. Changes must be approved by the Requester, Business Owner, Impacted Project Manager, Project Delivery Portfolio Manager, and Project Sponsor. Depending on the scale of the change, other approvals external to the project may be required. Guidance in this regard will be provided by the Project Portfolio Manager. Approved changes must be noted in steering committee minutes.
	The Tenderer must include the response to this request the applicable resource cost rate/s that shall be used to calculate cost of such changes.
<b>Service Level Agreement</b>	4th line support will be required from the service provider to ERI which will entail help desk services and fault or query escalation process.
	A 24/7 fault reporting channel will be required for any system issues that cannot be resolved within the ERI application support including a clear escalation process via a service desk with an Email, website portals with accompanying 24/7 Telephony escalation service desk for the duration of the support contract.
<b>Security</b>	Refer to the "240-170007584 Rev 2 - Web Services Security Standard.pdf" Document.

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	<ul style="list-style-type: none"> <li>• Role based authentication. Authentication should be token based.</li> <li>• Authentication Token e.g. OAuth2 and SAML2</li> <li>• Threat Protection</li> </ul>
	End 2 End Encryption: <ul style="list-style-type: none"> <li>• Data must be encrypted in transit</li> <li>• Data must be encrypted at rest</li> </ul>
	Strict adherence to the Protection of Personal Information Act, No 4 of 2013
	Provide the disclosure notices, maintain data privacy policy relating to sharing of the information, and ensure it secures the consent of its customers (Opt in) to share their personal information
	Before a customer uses the service, they must agree to the T&C's and agree to the fact that some personal information will be transmitted via the channel
	Confirm whether messages are capable of being decrypted, and duration of storing the encrypted data on a server social media channel.
<b>Cloud</b>	Cloud infrastructure provisioning for QA, Pre-prod, Development and Production. Service provider to ensure provisioning is done for QA, and other environments which will be needed for development, testing, training, and go-live as and when required. ERI is going to continue with changes as and when needed by Business so the provisioning of these environments when required is important.
	Service Provider to ensure that it secures the user's or customer's consent to process their personal information when they interact via the social media channel.
	Confirm how the solution will adhere to POPI Act so that ERI and ERI Customer will be protected. Confirm how ERI data will be secured in line with POPIA and where it will be stored. Indicate how you are going to handle the clause regarding the use of WhatsApp for business purpose which talks about getting permission from Facebook.

### Access requirements:

Role	System role	Types of access and what permissions that role has
Client liaison	<ul style="list-style-type: none"> <li>• Authorise transport notification</li> <li>• Create Quotation</li> <li>• Create RFT</li> </ul>	Read, Write
Operations Manager	<ul style="list-style-type: none"> <li>• Verifies quotation details</li> <li>• Authorises Quotation</li> </ul>	Read, Write, Delete
Scheduler	<ul style="list-style-type: none"> <li>• Capture Waybill items</li> <li>• Capture Transport Manifest</li> </ul>	Read, Write, Delete
Controller	<ul style="list-style-type: none"> <li>• Capture Brief/Debrief form details</li> <li>• Authorise Brief/Debrief form</li> </ul>	Read, Write,
Finance staff	<ul style="list-style-type: none"> <li>• Generate invoice</li> </ul>	Read, Write

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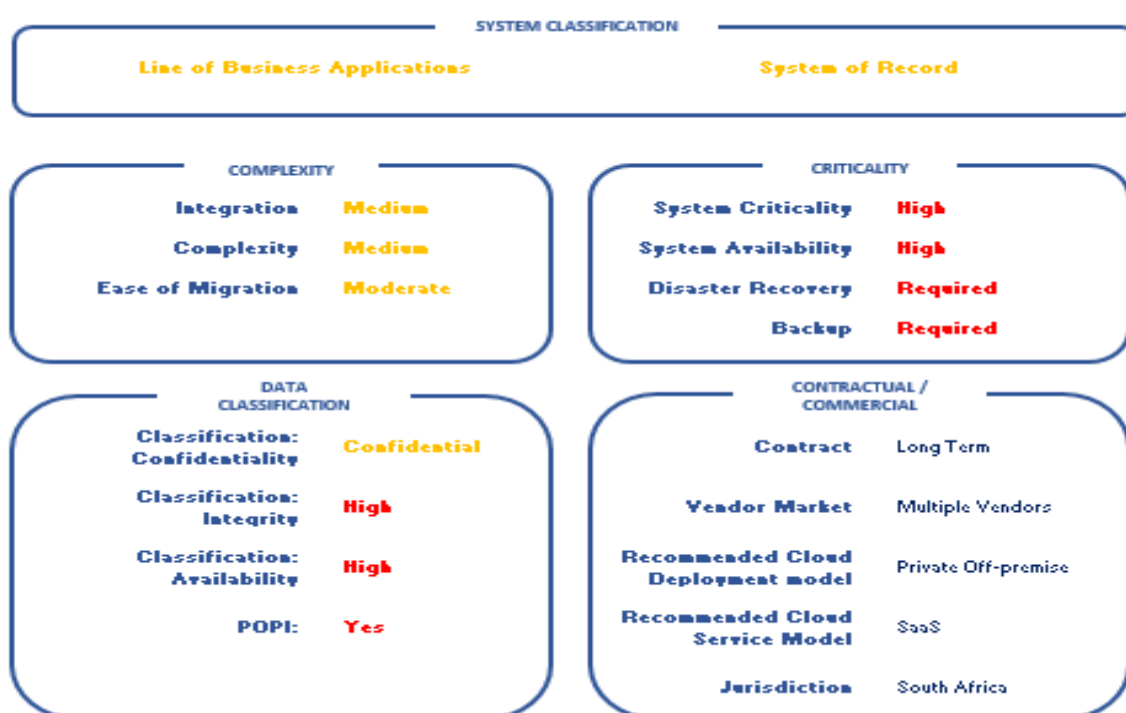
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	<ul style="list-style-type: none"> <li>Track payments</li> </ul>	
Subcontractor	<ul style="list-style-type: none"> <li>Declare vehicle availability daily on a daily basis.</li> </ul>	Read,Write

## Technical Requirements

Compatibility Certificate from Microsoft Azure	Solution Compatible with Microsoft Azure, OAUTH2
Compatibility Certificate from Microsoft Edge and Firefox browsers	Browsing compatibility
Network Printing	Solution allows network printing
Mobile Security	Anti-Malware Services for mobile devices that will be accessing the Eskom Network

## Cloud Requirements:



Cyber Attack	How will the vendor ensure that ERI's Data is protected from Cyber-attacks?
Support	Clear and concise SLA to be put in place
Loss, Leakage or Unavailability of data	Ensure encryption of data in transit and at rest
System Availability	Ensure redundancy at vendor site

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Storage and Archiving	Is this covering data on their cloud/site. Will ERI have the right level of access to data. Where is the data stored. Also storage and archiving. Including any Legal requirements.
Data Recovery	Provide details of backups. How long is it kept? Process for destroying data. Is ERI clearly informed about the procedure and conditions for the destruction of ERI data?
Security Logs	Does the system provide and give ERI access to audit trails, metadata and/or access logs to demonstrate security measures?

### Training/Transfer of skills:

- Logistics Management role-based system training is required.
- Super user -first line support training required



### Service Level Agreement requirements:

The final Service Level Agreement conditions shall be drafted during the awarding of the contract to the successful service provider. The vendor shall be expected to provide system support and maintenance throughout the duration of the contract.

The Logistics Management solution is classified as a business-critical application therefore must be available 24\*7 with an acceptable down time of between 4-8 hours for system maintenance including repairs and testing.

Disaster Recovery is required as per the business impact analysis to ensure business continuity in case of any disaster.

### DOCUMENT APPROVAL:

Name	Role	Signature	Date
Shaheen Osman	ERI Information Management Chief Information Officer		06/09/2022
Bonisani Nzama	Business Sponsor		2022.09.08

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