



# **AGRICULTURAL RESEARCH COUNCIL**

## **TERMS OF REFERENCE:**

### **DOCUMENT SCANNING AND ARCHIVING SOFTWARE SOLUTION**

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## **1. OVERVIEW**

The Agricultural Research Act 86 of 1990 (as amended) established the ARC, a premier agricultural research institution in South Africa. It is a schedule 3A public entity in terms of the Public Finance Management Act 1 of 1999, amended by Act 29 of 1999

## **2. INTRODUCTION**

This document requests a quote on a document scanning and archiving software solution for the ARC's financial documentation (Account payable, Procurement, Tenders, and S&T claim) for easy access and reporting for the next three years.

## **3. REQUEST FOR QUOTATION**

The Agricultural Research Council (ARC) invites suitably qualified and experienced Service Providers to propose a suitable Document scanning and archiving software solution for the ARC for 36 months.

The aim is to:

- Make the relevant documents available in electronic format on a web-based solution;
- Reduce the physical space required at the ARC by recoding and storing it safe offsite for archiving and retrieval;
- Create an image Repository from the current Paper-based or softcopy file systems;
- Make documents and files accessible to multiple users simultaneously and
- Link documents based on Supplier, Tender, and Employee numbers.

## **4. BACKGROUND TO THE BUSINESS SPECIFICATIONS**

The ARC needs to manage, store and retain Tenders, Account payable, Procurement, and S&T claim documentation, records, and other forms of information for specific periods. The system must organise all paper and digital files in one central location, where everyone has access.

The system should ensure that vital business information records are easily located and readily accessible to the ARC.

The solution must comply with the following:

- National Archives and Records Services of South Africa (NARSSA) standards
- The Minimum Information Security Standards (MISS)

## **5. SCOPE OF WORK**

The ARC requires a Document Scanning and Archiving Software Solution that will cover the following areas:

- The proposed system must store various document types, including word-processing files, emails, PDFs, and spreadsheets. The system must provide a document viewer that facilitates viewing different files and must support viewing documents in the document viewer or viewing documents in their default application.
- The proposed system must monitor and track documents through audit trails.
- The proposal must include back scanning and up-taking of documents based on packs providing and recoding the metadata.
- Soft copies and physical documents must be collected from the ARC Central office in the boxes provided.
- Electronic documents will be able to be directly uploaded into the solution.
- All document packs must be given unique barcodes that are tracked.
- All documents must be scanned at high quality for ease of review.
- The proposed system must search files by multiple keywords.
- The proposed system must have restricted access to documents based on rights.
- The proposed system must maintain physical and electronic security of Records.
- The proposed system must be compatible and facilitate scanning from network scanners.
- Ease of use

### **5.1 Document Types**

Different kinds of documents and content are created in the ARC. This includes Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Pdf, Outlook Item (.msg), and Jpeg files.

### **5.2 Metadata**

For each document, there should be metadata that will enable the ARC the search for documents

### **5.3 Document Storage**

The Physical documents must be taken offsite and stored in a secure environment with tracking numbers for easy access and retrieval

### **5.4 Access**

A web-based solution with 30 users' access based on rights must be provided.

## **6. COMPULSORY ARC REQUIREMENTS.**

**The following documents need to accompany the proposal.**

- A valid Tax PIN Number from SARS.
- Current Central Supplier Database (CSD Report)
- Complete and Sign the Standard Bidding Documents (SBD forms)
- All proposals must be submitted under the original letterhead of the business concerned

and must reflect the business registration details.

## 6.1 Operational conditions

Description	Compliance with TOR's	
	Yes	No
<b>Service required</b>		
The ARC requires a Document Scanning and Archiving Software Solution for the next three years that will cover the following areas or items:		
<b>Area / Item</b>		
The proposed system must store various document types, including word-processing files, emails, PDFs, and spreadsheets. The system must provide a document viewer that facilitates viewing different files and must support viewing documents in the document viewer or viewing documents in their default application.		
The proposed system must monitor and track documents through audit trails.		
The proposal must include scanning and up-taking of documents based on packs providing and recoding the metadata.		
Soft copies and physical documents must be collected from the ARC Central office in the boxes provided.		
The solution must allow for direct uploading of electronic documents.		
All document packs must be given unique barcodes that are tracked.		
All documents must be scanned at high quality for ease of review.		
The proposed system must search files by multiple keywords.		
The proposed system must have restricted access to documents based on user rights.		
The proposed system must maintain physical and electronic security of Records.		
The proposed system must be compatible and facilitate scanning from network scanners.		
Ease of use.		
<b>Oath of secrecy and vetting</b>		

All personnel and management involved with the ARC Document Recording and Archiving shall sign an "Oath of Secrecy" declaration at the commencement of this agreement and submit the declaration to the ARC Security Manager.		
No information concerning the ARC activities may be furnished to the public or media by the Contractor or any of their employees.		
All personnel, directors, and the Company itself shall be subjected to vetting before the commencement of the services and when deemed necessary for the duration of the contract.		

**Failure to comply with all of the above will lead to disqualification of your proposal.**

## **7. TECHNICAL REQUIREMENTS**

- Company Profile
- Three (03) reference letters with a least three (3) years experience of simila work, indicating the contracts value and duration/period.

**The 80/20 principle will apply in terms of the Preferential Procurement Policy Act.**

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (80/20 system)</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

**8. COSTING STRUCTURE FOR THE PERIOD OF THIRTY SIX (36) MONTHS**

Kindly quote as per the below layout for the purpose of comparing your quotations.

Detailed Service the period of thirty six (36) months	Quantities	Unit Rate Excl Vat	Total Cost Excluding Vat
Boxes with Lids	300		
Collections charges per box	300		
Handling Fee per Box	300		
Processing per Box	300		
Total Scanning Images over 36 months (including all mentioned three departments)	1 000 000		
Min of 3-4 Index criteria's per department (3).	3 - 4		
Archive Software Solution (Web-based)	1		
Access Licenses per user	30		
Any other additional charges?			
Sub-Total			
VAT (if applicable)			
TOTAL			

