



Technical Specifications

Cloud Hosted Telephone System

TECHNICAL CONTACT

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Contents

1. DOCUMENT CONTROL	3
1.1 Document History	3
1.2 Distribution	3
Acronyms	4
2. INTRODUCTION	5
2.1 General Information	5
2.2 Background	6
2.2.1 Remote Offices PBX infrastructure	6
2.2.2 National Office VoIP, Video and IM Platforms	6
2.2.3 Call Centre Recording	6
2.2.4 Network infrastructure	6
3. TECHNICAL REQUIREMENT SPECIFICATION	7
3.1 Scope of Requirement Specification	7
3.2.1 Queue Manager	8
3.2 Microsoft Teams Integration	9
3.3 Call Centre Features	10
3.3.1 Legal Aid SA Advice Line	10
3.3.2 Legal Aid SA IT Help Desk	10
3.4 Voicemail Features	10
3.5 Telephone Management System (Billing)	11
3.6 End user devices and terminals	11
3.7 Fax to email	12
3.8 SIP Trunking and Existing numbers	12
4. GOVERNANCE DELIVERABLES	13
5. SERVICE LEVEL AGREEMENT	14
6. PRICING	16
7. BID SUPPORTING DOCUMENTS	16
8. EVALUATION CRITERIA	19
9. BID CONDITIONS	23

1. DOCUMENT CONTROL

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1.1 Document History

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1.0	21 April 2022	First Draft	

Table 1: Document History

1.2 Distribution

Name	Company	Telephone no.	Email Address
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Bid Specification Committee	Legal Aid SA		

Table 2: Document Distribution

Acronyms

LO – Local Office

SO – Satellite Office

PO – Provincial Office

PE – Provider Edge

NO – National Office

VC – Video Conference

QoS – Quality of Service

DID – Direct Inward Dialling

ISP – Internet Service Provider

IVR - Interactive Voice Response

WAN – Wide Area Network

SLA – Service Level Agreement

SD-WAN – Software Defined Wide Area Network

2. INTRODUCTION

2.1 General Information

Legal Aid South Africa (*abbreviated "Legal Aid SA"*) is national public entity established in terms of section 2 of the Legal Aid South Africa Act 39 of 2014 (*"Act"*) read together with its Legal Aid Manual and Regulations. The objective of Legal Aid South Africa is to render or make available legal aid and legal advice, provide legal representation to persons at state expense and provide education and information concerning legal rights and obligations as envisaged in the Constitution and this Act. Legal Aid SA is funded by the Government and ensures access to justice and the realisation of the right to have legal representation.

Timelines

Date of Issue:	1 June 2022
Closing for questions:	14 June 2022
Final response to questions:	21 June 2022
RFP Submission Closing Date:	29 June 2022

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2.2 Background

Legal Aid SA has a total of 135 offices across South Africa, with 6 Provincial Offices (PO), 64 Local Offices (LO), and 64 Satellite Offices (SO) countrywide. The National Office is located in Braamfontein. Legal Aid SA's current network infrastructure includes a Converge Voice Video and Data capable MPLS which is in the process of being upgraded to SD-WAN technology. This project is expected to be completed before the end of October 2022. Each LO and PO operates on isolated telephone infrastructure. SOs are managed under one account with associated LOs administratively. This would mean that Legal Aid SA manages about 71 separate telephone contracts inclusive of the National Office.

2.2.1 Remote Offices PBX infrastructure

- a. All remote offices are using their isolated PABX system.
- b. Most offices are still using the copper lines provided by Telkom.
- c. Some are owning the infrastructure whereas most are renting.
- d. The number of users per office can be found in Annexure A1.

2.2.2 National Office VoIP, Video and IM Platforms

- a. On-premise Cisco Unified Communications Platform
 - i. Cisco Unified Call Manager 12.5: Licenced for 226 users.
 - ii. Cisco Unified Call Centre Express: Licenced for 43 seats.
 - iii. Cisco Unity Connection: Licenced for 210 users.
 - iv. Instant Messaging and Presence.

2.2.3 Call Centre Recording

- a. DataVoice Webrecall – Licenced for 25 active users.
- b. Microsoft Teams for all users.

2.2.4 Network infrastructure

- a. Wide Area Network
 - i. Private MPLS (Internet breakout via National Office).
 - ii. Current WAN setup will be upgraded from MPLS to SD-WAN to enable local Internet breakout.
- b. Local Area Network

- i. Managed internally from National Office.
- ii. LAN will remain the responsibility of Legal Aid SA.

3. TECHNICAL REQUIREMENT SPECIFICATION

Legal Aid SA hereby invites suitably qualified bidders to bid for the provision of a Clouded Hosted IP Telephony with Call centre functionalities for a period of five years. All services and products must be quoted on Operational Expenditure.

3.1 Scope of Requirement Specification

This section details the requirements for the required solution:

- 3.1.1 Cloud Based Telephone System consisting of an Ethernet-based network transport system comprised of the following components:
 - a) Cloud Based IP Telephony System
 - b) Call Centre System
 - c) Voicemail
 - d) Call recording System
 - e) Telephone Management System (Billing)
 - f) Supplementary Equipment and Systems
 - g) Fax to email
 - h) SIP Trunking
- 3.1.2 Provide all equipment and materials required for the planning, design, provisioning, delivery, configuration, installation, documentation, testing and training of a complete Unified Communication System as described in the subsequent section and in all related sections.
- 3.1.3 Legal Aid SA may elect to implement this project in a phased approach. Phase 1 will be the migration of the Call Centre. Phase 2 will be National Office and remote offices without existing contracts. Phase 3 will include remote offices as their contracts expire.
- 3.1.4 Cloud Based IP Telephony System
- 3.1.5 Calling Features
 - a) Caller ID/On Call Waiting: Know who is calling before you answer.
 - b) Call Forwarding: Redirect calls to your mobile/other numbers or soft phone so you do not miss any calls.

- c) Follow Me: Have one of your office numbers/extensions rings for a period of time and if unanswered forward to a second number and then third and so forth OR all ring the call concurrently.
- d) Caller ID Based Forwarding: Follow Me Based on number called and calling party.
- e) Inbound Number Tagging: Tag an inbound caller ID for easy reception management for multiple companies.
- f) Call Hold: Easily put a call on hold while you answer another call.
- g) Call Transfer: Attended Transfer (alert forwarding party before transfer) & Blind Transfer (transfer the call directly).
- h) Call Conferencing: Join a conference room by dialling a feature code or get transferred in.
- i) Call Waiting: Be notified when someone else is trying to call if you are already on a call.
- j) Do Not Disturb: Callers go directly to voicemail or call forward when you do not want to be disturbed.
- k) Call Logs: Access detailed call records by extension or account.

3.1.6 Ring Groups/Hunt Lists

- a) Ring groups: Simultaneously ring a set of phones based on a DID.
- b) Hunt lists: Set a linear line of ring groups (1 extension or many) for a period, before transferring to a second and third ring group etc.

3.1.7 Call Restrictions

- a) Block outgoing calls to specified numbers.
- b) Pin Code phone access. Operator Panel

3.2.1 Queue Manager

- a) Ability to view calls queues on a portal.
- b) Ability to view missed calls, dropped calls and unanswered calls. Media management
- c) Custom Music-on-Hold.
- d) Custom Digital Receptionist Recordings.
- e) Custom voicemail messages. CALL RECORDING
- f) Ad hoc call recording.
- g) Secure call recording storage.

- h) Archiving call recordings.
- i) Real time inbound and outbound call details records.
- j) Outbound call source listed by extension.
- k) Outbound call source lists for virtual extensions
- l) Ability to view report of entire organisation per department/division missed calls, dropped calls and unanswered calls.

3.1.8 Extension Manager

- a) Access, search and download call recordings.
- b) Personal profile editing.
- c) Detailed call analytics. Online Portal
- d) Online Management Portal for reporting, administration, and management of the Cloud Hosted PABX system.
- e) Ability to create users on the portal with specific security access to certain aspects of the system such as reporting and administration of specific areas/divisions/regions.
- f) Manage and record voice prompts.
- g) Create and customize IVRs
- h) Set and change working hours
- i) Control hunt groups and call queues
- j) View incoming and outgoing detailed call records
- k) Download and analyse call records
- l) See at a glance which users are online and using the phone (Operator Panel)
- m) Manage user access levels
- n) Call Forwarding and Call restricting

3.2 Microsoft Teams Integration

Legal Aid SA has invested in Microsoft technologies including Microsoft Exchange 2016, Microsoft Office 365 and Microsoft Teams. It is envisioned that the chosen provider should support tight integration to these technologies to provide:

- a) User Presence
- b) Simultaneous Ring
- c) Call from Teams
- d) Call from Email

- e) Teams Dial-in Conferencing
- f) Exchange Automated Voicemail Attendant

3.3 Call Centre Features

3.3.1 Legal Aid SA Advice Line

- a. 20 Call Centre Agents planned for future growth
- b. Subscription based consumption
- c. Skills based on eleven (11) official languages
- d. Instant messaging
- e. Soft phones
- f. Automated Call Recording
- g. CRM integration (using internally developed system for recording client's details)
- h. Be able to add the supervisor for assistance or escalation while the agent is still on call

3.3.2 Legal Aid SA IT Help Desk

- a. Fifteen (15) Agents
- b. Call routing based on caller enquiry, i.e Log a New Service Request, follow up on the existing call or to talk to IT support

3.4 Voicemail Features

3.4.1 Password Protected Voicemail: Prevent unauthorized access to voicemail.

3.4.2 Voicemail Greeting Options: Unavailable / Personal Message.

3.4.3 Voicemail to Email: Receive voice messages as a wav file (or _audio file_) attached to an email.

3.4.4 Digital receptionist – Interactive Voice Response (IVR).

3.4.5 Multi-level IVR menu management.

3.4.6 Manage multiple IVR menus for different Inbound Direct Inward Dialling (DIDs).

3.4.7 Day and Night Mode Schedule: Create different greetings according to time of day and day of week.

3.4.8 Custom Greetings: Upload third-party professional greetings to use as Digital Receptionist greetings.

3.5 Telephone Management System (Billing)

3.5.1 The TMS proposed should be manageable from the web browser (Google Chrome and Internet Explorer)

3.5.2 Accounts should have automated limits, whereby the Telephone Management System will block and prevent individual accounts from making personal calls once the specified limit has been reached. Limits should be configurable on a per account basis, in ZAR Rands.

3.5.3 The system should be able to email usage and cost reports to staff on a specified day of the month. This process should be fully automated, and no operator intervention should be required. In addition, the operator must be able to manually request and print reports for staff without email access

3.6 End user devices and terminals

End users must be able to access the all telephony services using any device, from anywhere provided they have Internet connection. All proposed devices must be certified to work seamlessly with Microsoft Teams. Headset and handset allocation as per the table below:

Device Type	Description	Quantity
Headsets	Headset with wireless and USB capability	2,535
Handset (Desk phones)	Handset for Executives and Personal Assistants, 64 for LOs, 12 for POs and 20 for NO	96
Handset (desk phones)	Handsets for Receptionists for LOs, POs and NO	72
Handset (desk phones)	Entry level phones for each office's consultation rooms	135

Handset (desk phones)	Conference phone for the boardrooms, one for each remote office and nine for NO	141
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Table 3: End user devices

3.7 Fax to email

3.7.1 The solution should cater for existing fax lines within Legal Aid SA

3.7.2 The solution should provide fax to email functionality to all users through:

- a. DID fax number per department
- b. DID fax number per office

3.8 SIP Trunking and Existing numbers

3.8.1. The provider will be required to port existing numbers

3.8.2. Numbers should remain the property of Legal Aid SA in the event that Legal Aid SA chooses to change SIP providers in the future

3.8.3. Each site will require a dedicated number as currently allocated to the site

3.8.4. Users will require a dedicated DID number. DID numbers exist for National Office users and should remain unchanged

3.8.5. Will leverage on the existing WAN for Internet connection

3.8.6. WAN service provider will be responsible for WAN availability and redundancy

3.8.7. Call Plans and Rates

- a. Local
- b. International - Destination dependant
- c. Cellular
- d. Organisation calls to be zero rated

4. GOVERNANCE DELIVERABLES

- 4.1 Detailed Project Plan including milestones and project phases.
- 4.2 Risk Management Plan that will address risks associated with scope, quality, schedule and cost.
- 4.3 Clear and proven Project Management methodology (e.g. Agile).
- 4.4 Project Execution Plans detailing the execution and monitoring of the project.
- 4.5 Project Acquisition Plan describing the acquisition of materials, goods and enabling system services supplied.
- 4.6 Project Quality Plan that describes the quality criteria of the project deliverables.
- 4.7 Project Communications, Change Management Plan and roll-back plan.
- 4.8 Project Resource Plan that describes the key resources who will be assigned to the project including the Project Manager.
- 4.9 A Service Transition Plan to ensure that there are no major disruptions during the changeover phase between service providers.

5. SERVICE LEVEL AGREEMENT

5.1. SLA Scope

The purpose of this section will be to define and measure the service supplied by the service provider to Legal Aid SA for the duration of the contract. Service providers **MUST** submit a draft SLA as part of this tender response. The SLA for the winning bidder will be reviewed by the legal team to be further incorporated in the final contract agreement. The service level agreement should define the following:

- 5.1.1. All services to be delivered as per timelines mutually defined and agreed by Legal Aid SA and the preferred bidder.
- 5.1.2. Third party vendor management.
- 5.1.3. The awarded bidder will ensure support for any issue related to availability and accessibility of Telephone services for all Legal Aid SA's offices.
- 5.1.4. The winning bidder will be solely responsible for any defect in the solution(s).
- 5.1.5. The winning bidder and its 3rd party vendors will be required to adhere to Legal Aid SA's policies and procedures.
- 5.1.6. The winning bidder to indicate a clear call logging and escalation procedure.
- 5.1.7. Service uptimes per service legal – the winning bidder will be required to adhere to service levels stated in table 4 below.
- 5.1.8. The bidder must indicate how penalties will be applied in a case where SLA is bridged.
- 5.1.9. Monthly service meeting will be held with a dedicated Service Manager.
- 5.1.10. Incidents reports and performance report with recommendations must be provided through the monthly meetings.
- 5.1.11. Service providers **MUST** also provide sample Dashboard/ reports as part of this submission.
- 5.1.12. Automated fault logging systems **MUST** be able to notify the Legal Aid SA network administrators when such calls are logged or closed either through SMS or email.

Severity Level	Description	Target Response
1. Outage	SaaS server down	Immediate
2. Critical	High risk of server downtime	Within 10 minutes
3. Urgent	End-user impact initiated	Within 20 minutes
4. Important	Potential for performance impact if not addressed	Within 30 minutes
5. Monitor	Issue addressed but potentially impactful in the future	Within one business day
6. Informational	Inquiry for information	Within 48 hours

Table 4: Service Levels

5.2. Reporting

Monthly SLA report must cover the following content:

5.2.1. System health and performance matrix.

5.2.2. List of all calls that were logged on the fault logging system on a monthly basis.

5.2.3. Time and date when the call was logged.

5.2.4. SLA reporting on the breached SLA measures and the remediation measures to ensure that issues are addressed timeously in the future. These sections should also include penalties to be applied as per agreed SLA measures.

5.2.5. Sample dashboard report must be attached as part of the proposal.

6. PRICING

- 6.1 All services and products should be priced on Operational Expenditure.
- 6.2 All prices should be indicated as either recurring or once-off payments.
- 6.3 Pricing should be indicated per annum for a period of five years.
- 6.4 Pricing must be provided per office, per services or product using Annexure A1.

7. BID SUPPORTING DOCUMENTS

Item Number	Document Description	Tick	Page reference where the document is placed in the proposal
Administrative Requirement			
1.	Full copy of submission USB (CD disc NOT allowed)		
2.	Tender submission hard copy (one original copy)		
Governance and Technical Documents			
3.	Company Profile – this must also indicate national geographical footprint, company experience in providing similar services, relevant client list, and projects completed. The company profile should not be longer than 3 pages.		
4.	Vendor Partnership Certificate (must be valid and current) for proposed vendor technology. The certificate must clearly indicate the vendor name, partnership level, engagement date and validity date.		
5.	CV and Qualification certificate of Project Leader. The CV must be accompanied by a valid PMP certificate, diploma or degree. This must be relevant		

Item Number	Document Description	Tick	Page reference where the document is placed in the proposal
	to the services required. CV to be completed as per the template provided in Annexure A3.		
6.	CV and Qualification/Certifications of installation technical resources. The CVs must be accompanied by valid and up-to-date certifications for the proposed vendor technology. CV to be completed as per the template provided in Annexure A3.		
7.	Project Implementation Plan: Provide overview of the project management methodology to be used and the phases included in the methodology in line with the delivery of this project methodology provided. Detailed project plan on how these systems will be implemented. A detailed Project Implementation Plan (including but not limited to Work Breakdown Structure (WBS), Resource Allocation and Timelines) with respect to operational readiness within a three-month period must be provided.		
8.	A clearly defined service transition plan for the migration of services from the current service providers.		
9.	A maximum of five relevant reference letters from previous/current clients on the company's letterhead with an authorised signature. The reference letter must be dated and not older than three years. Legal Aid SA will use these references as part of evaluation.		
10.	Detailed SLA as per the tender requirement.		

Item Number	Document Description	Tick	Page reference where the document is placed in the proposal
11.	Proposed solution outlining the architecture and functionality.		

Table 5: Supporting Documents

8. EVALUATION CRITERIA

All qualifying bids will be evaluated for functionality. The table below contains the weights of each functional requirement component. Bidders are not required to evaluate themselves, this will be done by Legal Aid SA. **Bidders who score less than 80% of the 100 points for functionality will be disqualified, and will not be evaluated further.** The bids that would have achieved 80% or more from the Functionality Evaluation will be further evaluated for Pricing.

					For Office Use
Focus Area	Max Points	Criteria	Point Allocation	Tick	Verification
Company Experience	10	Company profile provided spanning more than five (5) years' of experience in telecommunications services	10		
		Company profile provided spanning more than three (3) to four (4) years' of experience in telecommunications services	6		
		Company profile provided spanning less than three (3) years' of experience in telecommunications services	2		
Written references	10	>5 positive reference letters attached	10		
		3 - 4 positive reference letters attached	6		
		1 - 2 positive reference letters attached	2		

					For Office Use
Focus Area	Max Points	Criteria	Point Allocation	Tick	Verification
Quality of project leader	10	Certified Project Leader with ND or Degree in IT (Related field) with >5 years' experience in similar projects	10		
		Certified Project Leader with ND or Degree in IT (Related field) with <5 years' experience in similar projects	8		
		Project Leader without qualification but >10 years' experience in similar projects	4		
		Project Leader without qualification but <10 years' experience in similar projects	2		
Quality of project technical team	10	>5 certified technical resources with more than five (5) years' experience on similar projects	10		
		4 - 5 certified technical resources with more than five (5) years' experience on similar projects	8		
		2 - 3 certified technical resources with more than five (5) years' experience on similar projects	4		
		<2 certified technical resources with less than five (5) years' experience on similar projects	2		
Partnership	10	Vendor certified partner Certificate	10		

					For Office Use
Focus Area	Max Points	Criteria	Point Allocation	Tick	Verification
		Not certified by vendor	0		
Project Implementation Plan	10	Project management plan must include the following: - Detailed project execution plan - Work Breakdown Structure - Transition plan - Risk management plan - Change management plan	10		
		No project plan presented	0		
After sales support	15	The proposed SLA addresses the following components: - Incident reporting and escalation procedure - Performance Matrix (service uptime) - Sample dashboard/report - SLA penalties -Calls logged notification (SMS/Email) -Dedicated service manager	15		
		SLA that does not include all the components required	0		
Propose	25		25		

					For Office Use
Focus Area	Max Points	Criteria	Point Allocation	Tick	Verification
		The proposed solution considered all key technical components of the required solution: - IP Telephony – Section 3.2 - Call centre system – Section 3.3 - Voice mail system – Section 3.4 - Voice recording system - Telephone Management System – Section 3.5 - Fax to email – Section 3.7 - SIP trunking – Section 3.8			
		The proposed solution did not consider one or more of the key component of the required solution	0		
Total	100		Total		

Table 6: Evaluation Criteria

9. BID CONDITIONS

- 9.1. Bids MUST be submitted both in hard and soft copy. One original copy and soft copy on USB (CD disc NOT allowed).
- 9.2. Bidders may be requested to attend a meeting where they will be given the opportunity to present their proposal to the Bid Evaluation Committee.
- 9.3. Bids must be submitted in line with any attached annexures and detailed specifications. Failure to bid accordingly shall invalidate the bid.
- 9.4. Legal Aid SA reserves the right to award the bid to one or more service providers.
- 9.5. Legal Aid SA reserves the right to award the bid in whole or only partially.
- 9.6. The General Conditions of Contract as stipulated by the National Treasury will be applicable.
- 9.7. Legal Aid SA, like any other business, relies greatly on suppliers for most services, therefore, the interaction with supplier/contractors/consultants can have a substantial impact on a Legal Aid SA operation. Legal Aid SA can be negatively impacted by a supplier who does not have a good reputation or has been implicated in unethical activities, by association. To mitigate this reputational risk, Legal Aid SA will investigate any negative and positive news on the particular supplier/contractor/consultant before doing any business and make an informed decision about association.