



ENVELOPE A – TECHNICAL PROPOSAL

TENDER NO: PROJ-ICT-111

REQUEST FOR PROPOSAL (RFP) PACK

CONFIGURATION, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF MICROSOFT
DYNAMICS 365 FOR THE EAST LONDON INDUSTRIAL DEVELOPMENT ZONE SOC LTD

START DATE: 14th October 2022

CLOSING DATE: 4th November 2022 (12h00)

NAME OF TENDERER: _____

TENDERER'S ADDRESS:

CHECKLIST FOR SUBMISSIONS

ITEM	TICK
Supporting Documentation To Be Submitted	
Accredited Valid Original or Certified B-BBEE Certificate or Letter from an Accountant confirming Annual Turnover for EMES - Sworn Affidavit confirming annual turnover and B-BEE management split of company	
Company Profile	
Three (3) Completed Reference Letters (Annexure 2)	
Proposed Solution and Project Approach	
Project Team Skills Matrix and Curriculum Vitae's	
Compulsory Documentation To Be Submitted	
Completed and Signed ELIDZ Procurement Handbook with all relevant supporting documentation (Tax clearance etc.)	
CSD Registration Certificate	
JV Participation Documentation (If applicable)	

Please Note: All the above documents must be submitted with Envelope A - Technical Proposal.

The price schedule and proposed solution costing must be submitted with Envelope B – Financial Proposal.

RFP PACK CONTENTS

1. **Section A:** General Guidelines
2. **Section B:** Requirements Specification
3. **Annexure 1:** Procurement Handbook
4. **Annexure 2:** Reference Letter



SECTION A: GENERAL GUIDELINES

FOR THE CONFIGURATION, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF
MICROSOFT DYNAMICS 365 FOR THE
EAST LONDON INDUSTRIAL DEVELOPMENT ZONE SOC LTD

1. EVALUATION CRITERIA AND COMMERCIAL EQUITY GOALS

The East London Industrial Development Zone (ELIDZ) supports national transformation goals and strives to target its procurement to create opportunities for Historically Disadvantaged suppliers and service providers. In awarding this tender, preference will be given to companies with a better rating in terms of contributions towards Broad Based Black Economic Empowerment (BBBEE).

The “tender” will be evaluated in accordance with the ELIDZ Procurement Policy using the 80/20 rule i.e. 80 of evaluation points will be based on price competitiveness and 20 will be based on BBBEE status. The following formula is used:

Calculation of the points for Price:

$$Ps = R \times \left[1 - \frac{Pt - Pmin}{Pmin} \right]$$

Where:

Ps = Points scored for price of tender under consideration

R = Percentage of the price

Pt = Rand value of tender under consideration

Pmin = Rand value of lowest acceptable tender

R must be up to a maximum of 80

Score Breakdown:

Price (R) = 80 points

BBBEE = 20 points

A maximum of twenty (20) points will be awarded to a tenderer for achieving BBBEE objectives.

Preference points shall be awarded on the basis of a B-BBEE verification certificate issued by an accredited Verification Agency.

Tenderers are required to submit a Valid original or certified B-BBEE Certificate. Failure to submit a valid B-BBEE certificate will result in zero points being awarded for preference.

Unincorporated Joint Ventures are required to compile a consolidated verified BBBEE certificate in order to achieve Preferential Points

The following table shall be used to convert the contribution level as per B-BBEE certificate into points.

Table: B-BBEE Points Conversion

Level Contribution	B-BBEE Score	Points Conversion 20
Level 1	>100%	20
Level 2	85~100%	18
Level 3	75~85%	14
Level 4	65~75%	12
Level 5	55~65%	8
Level 6	45~55%	6
Level 7	40~45%	4
Level 8	30~40%	2
Non-Compliant	0~30%	0

Companies with annual turnover less than R10million (Exempted Micro Enterprises or EME's) are automatically awarded a level 4 contributor status, unless the EME is Black Owned (more than 50% black ownership), in which case the enterprise will have a level 2 contributor status. EME which is 100% black owned qualifies for a level 1 contributor. In awarding the EME status, the ELIDZ shall accept a letter from an accounting firm or SARS confirming a company's turnover as less than R10m as well as a sworn affidavit confirming annual turnover and level of black ownership. B-BBEE certificates issued by non-accredited verification agencies will not be accepted as valid proof of a company's B-BBEE status.

No points will be awarded for achieving B-BBEE objectives if the total percentage scored for B-BBEE is less than 30%. All tenders with functionality less than 70% of the total functional requirements will not be considered for the next stage of tender evaluation.

The tender will be awarded to the bid with the highest number of points. A tender may be awarded to a bidder that did not score the highest number of points if reasonable and justifiable grounds exist.

Any contract offered by the ELIDZ will be based on the correctness of information submitted by the service providers. Any misrepresentation of facts by a service provider may lead to disqualification. Should such misrepresentation be uncovered after the commencement of the contracted work, the ELIDZ reserves the right to terminate the contract and recover all payments made to that service provider and any costs that may have been incurred in the process.

ELIDZ reserves the right to have the tenderer's Black Economic Empowerment Credentials verified by an independent agency. (Procurement Handbook – Annexure: 1 must be fully completed and supplementary information may be completed by service providers with a turnover of less than R10m and be accompanied by letter from an accounting firm or SARS confirming the company's or sworn affidavit turnover is less than R10m).

2. CONDITIONS OF TENDERING

General Conditions

Please note the following conditions are applicable to all tenders:

- Compulsory briefing meeting will take place on virtual platform on the **21 October 2022** at **10h00** am on the following link: https://teams.microsoft.com/l/meetup-join/19:meeting_OTM3NTEzOWMtY2JiOS00MzQ4LTk3YmQtMWJmZGE0ZjliZjYw@thread.v2/0?context=%7B%22Tid%22%3A%22bd71323e-f0dc-4d06-8e22-af342304bedc%22%2C%22Oid%22%3A%2209174bf1-727b-442f-84bb-83ce732c74d2%22%7D
- Questions relating to the RFP will be accepted until **16h00 on the 28 October 2022**. All questions must be submitted to Zandile Mtebele via e-mail to zandile@elidz.co.za
- The closing date for this tender is at **12h00** on the **04 November 2022**;
- E-mailed, faxed, late, or incomplete proposals will not be considered;
- ELIDZ is not obligated to accept the lowest or any proposal;
- Tender documents are to be securely bound;
- Any expenses incurred by the tenderer in preparing and submitting the proposal will be for the tenderer's account, as the ELIDZ SOC Ltd will not accept any liability in this regard;
- We reserve the right to correct discrepancies and errors as necessary with the consent of the tenderer; however, the value total of the prices shall remain unaltered;
- Proposals which do not comply with the tender conditions or which are incomplete will, as a general rule, not be considered.
- Tenderers must be registered on CSD database from Treasury.

3. SIGNATURES ON TENDERS

All tenders submitted must be signed by that individual, or by someone on his behalf duly authorized and proof of that authority must be attached. All tenders submitted by a company must be signed by a person duly authorized thereto by a resolution of the Board of Directors, a copy of which resolution, duly certified by the Chairman of the company can be submitted with the tender.

If the tender is submitted by a joint venture of more than one person and/or companies and/or firms it shall be accompanied by:

A certified copy of the original document under which the joint venture was constituted. This document must clearly define the conditions under which the joint venture will function, as well as the duration and participation of the several constituent persons and/or companies and/or firms.

A certificate signed by or on behalf of each participating person and/or company and/or firm authorizing the person who signed the tender to do so.

In instances of a joint venture, each participating person and/or company and/or firm must complete and submit Annexure A (Procurement Handbook) with the tender together with all profit sharing percentage information.

4. AREA OF SERVICE/POINT OF DELIVERY

The delivery of services will be required at the ELIDZ office, Lower Chester Road, Sunnyside, East London.

5. SPECIAL CONDITIONS APPLICABLE TO THIS CONTRACT

Service Providers must note the following special conditions of contract will apply to this contract:

Modification of any applicable terms of reference of this contract must be mutually agreed between the parties and reduced to writing.

- VAT: Unless otherwise stated all prices will be inclusive of **Value Added Tax**.
- All services provided must comply and be in accordance with pertinent laws and policies of government.

Where the SERVICE PROVIDER has incurred any liability to the CLIENT, whether arising from or under this Agreement or otherwise howsoever arising, the CLIENT may, without notice to the SERVICE PROVIDER set-off the amount of such liability against any liability of the CLIENT to the SERVICE PROVIDER arising from or under this Agreement, whether either such liability is liquidated or unliquidated, present or future, accrued or contingent, unless otherwise agreed to in writing by the CLIENT.

In the event that the successful Bidder has been awarded the contract with value above R 5 000 000.00 for the same goods/services on a consecutive basis, the successful Bidder will be required to submit a Supplier development plan for SMMEs to be agreed with the ELIDZ.

Where there is no designated sector, ELIDZ may decide to include a specific bidding condition that only locally produced goods or services with a stipulated minimum threshold for local production and content, will be considered, on condition that such prescript and threshold(s) are in accordance with the specific standards determined by the DTI in consultation with the National Treasury.

6. COMPANY PROFILE

A brief company profile is required, to assist ELIDZ in assessing your capabilities, capacity and competitive advantages.

7. INADEQUATE SERVICE LEVELS AND PERFORMANCE

In instances of transgression of a more serious nature, should the ELIDZ during the contract period for any reason regard the Service provider's service levels and performance against this contract as being inadequate or not to the ELIDZ's satisfaction, the details will be reduced to writing, clearly headed "Inadequate performance" and sent to the service provider. In the event that the service provider is unable to remedy the

complaints to the ELIDZ's satisfaction within 14 days of such notice of inadequate performance, ELIDZ reserves the right to immediately cancel this contract and recover costs in terms of the Service Agreement.

8. SERVICE LEVEL AGREEMENT

The successful tenderer will be required to enter into a written Service level agreement with the ELIDZ which will be based on the draft Agreement set out herein in Section C, which will include Section A and B and include such terms and conditions as Management may require or prescribe to give effect to in terms of its legal obligations.

9. PRICE BASIS

ELIDZ requires the tender price to remain firm for the validity period of ninety (90) days after the closing date of the tender. The tender price shall be in South African Rand.

Where prices are subject to variation it must be noted that no prices are to be revised or invoiced, without prior mutual agreement and official modification of the contract.

10. PAYMENT TERMS

A maximum payment processing period of thirty (30) days will be enforced. The thirty-day period is effective from the date a complete claim is received. A complete claim requires the following to be processed:

- Original invoices;
- Original covering letter of approval by the consultant where applicable;
- Original covering letter of approval by the relevant ELIDZ official where applicable.
- Statement of accounts

All information relating to the ELIDZ's customers (and potential customers), systems, operating procedures etc. is confidential and to this end, the successful tenderer will be required to enter into a Confidentiality Agreement with the ELIDZ.

11. SUFFICIENCY OF TENDER

The tenderer shall satisfy itself before tendering, as to the correctness and sufficiency of its tender for the project. The tenderer shall ensure that the rates and prices it has stated in the schedules cover all the obligations included in the tender and sufficient for the proper completion of the project.

12. TENDERER'S CONDITION

All tenderer's shall be deemed to have waived, renounced and abandoned any terms and conditions printed or written upon any stationery used by the tenderer for the purpose of, or in connection with the submission of this tender.

13. DISQUALIFICATION

Respondents are advised that should there be any contact with ELIDZ staff and the Adjudication Team which could in any way be seen or deemed to constitute a conflict of interest, bribe or otherwise influence the process and the outcome thereof, will result in immediate disqualification.

It must be stressed that any queries relating to this tender must be in writing and within the period of one week from the date of the briefing session and must be addressed to the Project Manager only. Respondents are not to communicate in any manner or form whatsoever with members of ELIDZ personnel about the RFP until the winning service provider has been selected and such selection has been formally communicated to the public. Any such communications by Respondents with ELIDZ personnel or with persons other than the Project Manager may prejudice a Respondent and may lead to disqualification from consideration for selection. The ELIDZ cannot accept responsibility for the accuracy of any information obtained outside the formal communication process as stipulated.

Any misrepresentation, in particular as it relates to the truthfulness of involvement of HDI's at both ownership level, management and operational level will also result in immediate disqualification.

14. SHEQ COMPLIANCE

Before starting work, service providers must produce the following for approval:

1. Project specific Safety, Health & Environmental (SHE) Risk assessments,
 - a. SHE Risk assessments to include activity specific risks, service providers risk to the ELIDZ and the ELIDZ risk to them;
2. SHE plans and safe work procedures must be developed to respond to project specific activities as well as to identified risks: for example (waste management plans, fall protection plans etc.);
3. List of applicable PPE required;
4. Letters of Good standing with workman's compensation where applicable;
5. Applicable legal appointments - as required;
6. List of chemicals and related Material Safety Data Sheets;

All of the above must be included in a SHE file together with:

1. Copy of scope of work;
2. Copy of appointment;
3. PPE issue register;
4. Requisite training / competency certificates where applicable;
5. Medicals as applicable to the nature of the work (for example, there must be medicals for employees who will be working at heights to confirm that they are fit to work at heights);

15. ACCEPTANCE OF TENDER IN WHOLE OR IN PART

The ELIDZ reserves the right to accept the complete tender as submitted by the tenderer or alternatively, to accept only specific "areas of work" (or parts of "areas of work") of the tender as it sees fit.

Accordingly tenderer's are advised to ensure that all prices submitted against each "area of work" are sufficient to cover the tenderer's entire obligation as defined in these documents, required to provide each specific "area of work".

16. SUPPORTING DOCUMENTATION TO BE SUBMITTED

ITEM	TICK
Accredited Valid Original or Certified B-BBEE Certificate or Letter from an Accountant confirming Annual Turnover for EMES - Sworn Affidavit confirming annual turnover and B-BEE management split of company	
Company Profile	
Three (3) Completed Reference Letters (Annexure 2)	
Proposed Solution and Project Approach	
Project Team Skills Matrix and Curriculum Vitae's	

17. COMPULSORY DOCUMENTATION TO BE SUBMITTED

The following documentation is considered as compulsory documentation and is required to be submitted with your tender. Failing to submit the compulsory documentation will lead to disqualification due to non-responsiveness.

ITEM	TICK
Compulsory Documentation To Be Submitted	
Completed and Signed ELIDZ Procurement Handbook with all relevant supporting documentation (Tax clearance etc.)	
CSD registration certificate	
JV Participation Documentation (If applicable)	

18. POPIA

By submitting this tender, the bidder hereby consents to providing the ELIDZ with personal information as provided in the Protection of Personal Information Act 2013 (POPIA).

The ELIDZ undertakes to:

1. It will take all reasonable steps and precautions to preserve the integrity of bidders Personal Information and to prevent any corruption or loss of such data.

2. It will not do any of the following: copy, compile, collect, collate, process, store, transfer, alter, delete, interfere with or in any other manner use the bidders Personal Information as described in the Act for any purpose other than with the express prior written consent of the bidder.
3. Utilize the personal information provided for the purposes of assessment of the tender submitted by the bidder and contracting with the successful bidder as the case may be.
4. It will immediately inform the bidder in writing if any Personal Information relating to it has been compromised. The ELIDZ undertakes to immediately inform the bidder in writing as to how it will manage such compromise and what steps will be taken to rectify the situation.
5. Due and reasonable care of the bidders personal information and not to share the said personal information with any third party unless you have authorised such disclosure or the release of such information is required by law.
6. At all times strictly comply with its obligations under Data Protection Legislation.
7. Subject to legislative, regulatory, contractual and other legitimate conditions, the respective bidder has certain rights in terms of how their information is processed. The bidder can request access to information or guidance on how to lodge a complaint from or direct a request to exercise afforded rights to the ELIDZ Information Officer, or his/her deputy/ies, or the Information Regulator.
8. It will maintain guidelines, policies or procedures for the retention or destruction of data and will retain it only as long as necessary for the identified purposes or to meet legal requirements or policies.
9. It shall implement and maintain, at its cost and expense, appropriate, reasonable technical and organisational measures to prevent loss of, damage to or unauthorised destruction of Personal Information and unlawful access to or Processing of Personal Information.

The ELIDZ shall not incur any liability for costs, loss or damage arising from the use of inaccurate or incomplete data provided by or on behalf of the bidder.

19. METHOD OF SUBMISSION

The RFP document will be available for download at no cost on **14 October 2022 at 12h00 (Noon)** from the East London Industrial Development Zone website: www.elidz.co.za under Opportunities >> Tenders All tender documents are to be submitted online at <https://tenderportal.elidz.co.za> on the **4 November 2022** not later than 12h00(Noon).

The ELIDZ reserves the right:

1. To negotiate with the successful tenderer and/or
2. modify the RFP's goods / service(s) and request Respondents to re-bid on any changes;
3. reject any Proposal which does not conform to instructions and specifications which are detailed herein;
4. disqualify Proposals submitted after the stated submission deadline;
5. disqualify Proposals submitted that do not meet the goods or services specifications;

6. disqualify Proposals submitted that do not meet the necessary functionality where required;
7. not necessarily accept the lowest priced Proposal;
8. reject all Proposals, if it so decides;
9. place an order in connection with this Proposal at any time after the RFP's closing date;
10. split the award of the order/s between more than one Supplier/Service Provider; or
11. make no award at all;
12. ELIDZ reserves the right not to award business to the highest scoring bidder/s where objective criteria justify the award to another bidder.
13. The ELIDZ does not bind itself to accept your (or any) proposal, nor will it disclose any information regarded as confidential.



SECTION B: REQUIREMENTS SPECIFICATION

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1. Introduction

The objective of this bid is to appoint a suitable, independent service provider that will configure, implement, maintain, and support a Microsoft Dynamics 365 system that will assist the East London IDZ to integrate many functions across the business, such as financial management, human resources, procurement, and sales, to deliver benefits such as increased productivity and efficiency for a period 4 years.

1.1 The scope of this RFP includes the following:

The preferred service providers will work with the ELIDZ and configure, implement and support all elements of the Dynamics 365.

High level project deliverables are as below:

- Configure, implement Microsoft Dynamics 365.
- Data migration.
- Integration with SharePoint, GIS and Payroll system.
- Support and maintenance for 3 years.

2. Considerations

2.1 Requirements Considerations

The score achieved for quality functionality will be assessed using the following criteria, each of which will be scored individually up to the maximum number of points indicated (failure to submit the relevant information will result in zero score for that section). All technical elements under Section B item no. 3 are considered mandatory and not providing any of the required services will regard the submission as non-responsive.

3.1 Functionality Evaluation Matrix

Evaluation Areas	Evaluation Criteria	Total Max Points	Item Max Points	Evaluation Description
Project Management	Project Management Plan	5	5	Sample project plan provided with an example of a previous schedule done.
Solution proposition	Completeness of the offered solution.	20	0	No Monthly Report Sample
			20	Detailed solution proposal provided that fully

Evaluation Areas	Evaluation Criteria	Total Max Points	Item Max Points	Evaluation Description
				addresses IDZ requirements.
			10	Solution proposal provided partially addresses the IDZ requirements.
			0	Solution proposal provided does not address the IDZ requirements or is not provided.
Service Providers Expertise and Resources	Service Provider expertise	45	15 pnts each	10 Points will be awarded for each contactable, stamped and signed reference letter relevant to this tender. The reference letter need to demonstrate previous work with an organisation of 60 or more employees were the same system was configured and rolled out in the past five (5) years.
	Skills Competency	30	30	Project team composition (minimum of 5 people) and details provided with CV's and Qualifications and 80% of the resources with certified Microsoft Dynamics Qualifications.
			20	Project team composition (minimum of 5 people) and details provided with CV's and Qualifications and more than 50% of the team have relevant Microsoft certificates.
			10	Project team composition (minimum of 5 people) and details provided with CV's

Evaluation Areas	Evaluation Criteria	Total Max Points	Item Max Points	Evaluation Description
				and Qualifications and less than 50% of the team have relevant Microsoft certificates.
			5	Project team composition and details provided, but with no CV's
			0	No project team details provided

NB: Minimum points required to proceed to the next evaluation phase is 70 out of 100.

4.1 Financial Considerations

- Payment milestones will be attached to the service level agreement.
- The total bid price from the service provider for this project can't be exceeded. All service providers need to ensure that the rates and price tendered sufficiently covers the service provider's obligations under this project and will allow for the proper completion of the project.
- The licenses should not be included in the project costing. All travel and accommodation and other relevant costs should be included in the project cost and cannot be billed separately. All costs should be reflected in envelop B and any mention of price in envelop A will deem this submission non-responsive.

5.1 Time Constraints

The East London Industrial Development Zone would like this project to commence as soon as possible after approval and the signing of the service level agreement.

Milestones

Target date

Configuration of the system : completed by the 31 March 2023
 After go-live support (3 months) : completed by the 30 June 2023
 3-year support and maintenance: 01 July 2023 – 30 June 2026

6.1 Area of Service and Facilities

- The delivery of services will be required at the East London IDZ offices, Lower Chester Road, Sunnyridge, East London or anywhere the service is required.
- Onsite storage and office space will be made available if and when required.

3. Detailed Requirements

This section will aim to unpack all elements require for this project.

3.1 Detailed solution

3.1.1. Objective

The ELIDZ is currently utilizing a Microsoft product, Microsoft Dynamics AX 2012 R2 as the main ERP system. The system has been in operation for the past eight (8) years and it is being fully utilized. Microsoft added many new features in last 8 years and the current version that the organization is now using has since been upgraded. We need to upgrade to the cloud based Microsoft Dynamics 365 as the currently installed version is no longer supported.

The aim of this tender is to appoint a service provider with the capability to configure, implement, maintain and support the Microsoft Dynamics 365 for the East London IDZ. Together with data migration, the following functionality is in scope:

- Human Resources
- Finance
- Field Service
- Supply Chain Management
- Sales
- Marketing
- Customer service
- Project service automation

The desired outcomes of the Microsoft dynamics implementation are:

- Enhanced collaboration capability between departments and different program areas;
- improved unstructured information management capabilities;
- supported integration of tools and data specifically with additional features within Office 365 and other external systems to create one seamless ecosystem.

The scope of the project is gathering, governance development, architecture and build-out of the Microsoft dynamics & Sharepoint site, building workflows, system integration as well as general optimization of existing Office 365 functionality (Teams, Microsoft dynamics & Sharepoint sites) and reporting metrics. The outcome must improve user-system interaction within Microsoft dynamics & Sharepoint and Office 365.

Service provider as the implementation partner for Microsoft dynamics must improve the current Office 365 and Microsoft dynamics system and offer training services that must enable ELIDZ to optimize its use of Microsoft dynamics for all its internal operational departments and program areas.

3.1.2. Purpose

Service provider must perform a baseline assessment of the existing infrastructure including gather and document requirements (scoping), develop an implementation and backup plan, and execute against this plan.

3.1.3. Project management

A project plan with dates and milestones must be created by Service provider and followed throughout the engagement. Service provider will work with a project manager from ELIDZ to plan and schedule all work.

3.1.4. Microsoft Dynamics design

Evaluation that must be performed by Service provider must validate that the setup configuration and foundation is in accordance with best practices and must function as expected. This must include but is not limited to the following sections:

- o Functional Requirements Document that must capture high-level information concepts and specific business capabilities and/or business objectives.
- o Governance Plan
- o Information Architecture
- o Training Plan

3.1.5. Microsoft Dynamics Build

Service provider must present the solution in a test environment to the IT team and the Project Manager for assessment and consideration for GO-NO-GO before uploading to the Microsoft dynamics live environment. With assistance from ELIDZ's ICT staff, Service provider must map out the necessary configurations within Microsoft dynamics including creating a backup strategy and management for the modules built.

The Service provider must provide a detailed documentation together with the entire code and all designs used in the Microsoft dynamics development. The documentation must be availed in both soft-copy and hard-copy while the code must be available in softcopy. Service provider team must engage with ELIDZ's ICT department save the code while testing the same. Signoff must be dependent on satisfactory handing over of the detailed documentation that is acceptable to ELIDZ's ICT team.

The Service provider must document the details of the system configuration and include the same in the handover document to be signed off by the Service provider Director.

When ELIDZ's Project Manager provides initial acceptance of the solution, Service provider, in collaboration with ELIDZ's ICT department, must develop a Test Plan document. ELIDZ's ICT staff together with the Service provider technical team must execute the Test Plan and document defects that are created after the testing plan is executed. Service provider must be responsible for resolving the defects and the test process re- activated again to ascertain all the documented defects have been fixed before live rollout.

Service provider must provide instructional documents necessary for covering all standard and recurring operational tasks for each environment including but not limited to:

- System Backup and Restore,
- Database Maintenance Tasks,
- Environmental Build to Build Upgrade Steps, etc.

All template/functionality customizations must be documented.

3.1.6 Microsoft Dynamics Deployment

After a signed off functional specifications has been developed by Service provider and ELIDZ and an acceptance signed off, Service provider must guide preparation for and deployment of the production system by availing a detailed project management document with clear step by step project execution plan with detailed and clear agreed timelines.

As part of deployment, Service provider must also be required to develop training materials (This must include the development of detailed system manual and PowerPoint training materials) and deliver training for Finance team and power users for other units, who must serve as Microsoft dynamics champions for the entire ELIDZ.

Training materials developed must enable ELIDZ ICT to provide for ongoing training of future Microsoft dynamics content managers. In addition to business user training, Service provider must be required to provide knowledge transfer and formal training to all the ICT staff tasked with Microsoft dynamics administration responsibilities.

Training must include the following:

- Technical training covering usage of PowerShell and other scripting to streamline system Administrator functions and provide enhanced system administrative capability.
- System Administrator training and knowledge transfer to enable staff to effectively support and manage Microsoft dynamics 365.

3.2. Detailed requirements per functionality

3.2.1 Dynamics 365 Human Resources

Over and above the standard functionality, the implementor is expected to configure and provide functionality for:

- Talent management (Recruitment and selection), and
- People analytics and feedback.

The payroll functionality is out of scope since the ELIDZ is currently utilizing Psiber Payroll System however the system should be able to upload data from the payroll system.

3.2.2 Finance modules

The ELIDZ is currently fully utilising the finance modules and the implementor is expected to configure and provide functionality for:

- General ledger

- Budgeting
- Cash and Bank Management
- Accounts Payables
- Accounts Receivables
- Fixed Assets Management
- Periodic Activities, and
- Reporting (Business Intelligence) / Power BI.

There is minimal customisation envisaged however there are currently about six custom made reports that were not standard in the previous installation. The implementor will be expected to configure a maximum of twenty customise reports and dashboards. The work required for the custom reports and dashboard should be estimated and included in the tender price.

3.2.3 Field Service

This functionality is not being utilised by the organisation how a need has been identified and is required going forward. The module will be deployed with limited customisation.

3.2.4 Supply Chain Management

The ELIDZ is currently utilising the supply chain management functionality and the implementor is expected to configure and provide functionality for:

- Procurement and sourcing
- Vendor portal
- Integration with Microsoft SharePoint for documents storing purposes.

There is minimal customisation envisaged however there are currently about three custom made reports that were not standard in the previous installation. The implementor will be expected to configure a maximum of ten customised reports and dashboards. The work required for the custom reports and dashboard should be estimated and included in the tender price.

3.2.5 Sales

The ELIDZ has a customised process that it wants configured the successful service provider. This can be made available upon request by prospective bidders.

3.2.6 Marketing

This functionality is not being utilised by the organisation how a need has been identified and is required going forward. The module will be deployed with limited customisation.

3.2.7 Customer service

The module will be fully deployed with limited customisation.

3.2.8 Project Service Automation

The module will be fully deployed with limited customisation.

3.3. Support and maintenance

The successful service provider is expected to have on-site resource(s) for a period of three months effective from the go-live date. The resource(s) will provide hands-on support to the ICT employees when issues and/or incidences arise.

The maintenance and support offered should include fifty (50) hours per year for 2nd and 3rd level support. Support will be done remote mostly.

3.4. Other system requirements

The system should have an ability to integrate with the ELIDZ document management system (SharePoint) to allow users to upload crucial documents as attachments to various system entries. This helps in archiving crucial documents.

The duration of this project will be 4 years.

4. Response Format

4.1 Company profile

- Provide an overview of your company profile.
- Provide information on your operation office locations. Do you have local offices in the BCM Metropolitan Area \ Eastern Cape Province \ National or International?
- Provide a Municipal Clearance Certificate
- Provide an organogram for team allocated to this project in terms of roles and responsibilities
- Proof of SA residential for at least 3 partners or team members

4.2 Service provider skills competency

- Provide a detailed list of personnel whom will form the team for this project, listing similar projects completed by each team member, their relevant skills \ qualifications and years of work experience relevant to this project.
- Provide a detailed list of reference sites of similar size (80 employees or more) and the work completed.

4.4 Detailed Proposed Solution

- Describe your understanding of the requirements in this tender.
- Please provide details for your proposed solution.

4.5 References

- Provide a minimum of (3) three references relevant to this tender, with completed reference letters, stamped, signed and dated by the referee. The reference letter MUST be on ELIDZ template that is provided.
- Provide details of the relevant services offered to these references, establishing a track record as well as provide contactable references at these sites \ clients.

4.6 Monthly report sample.

Please provide sample reports. Proposed reporting tools and programs that you will be utilized. Provide a schedule of activities of a previous project.

4.7 Team composition

Team should be made up of at least five employees three of which must be South African residents.

Please forward any queries to: Zandile Mtebele at the following contact details:

E-mail: zandile@elidz.co.za

Tel: (043) 702 8200

Fax: (043) 702 8251



ANNEXURE 1

Procurement Handbook



ANNEXURE 2

Reference Letter



ANNEXURE 3

Brochures

