

**REQUEST FOR DETAILED WRITTEN QUOTATIONS**

Inkosi Langalibalele Local Municipality wishes to migrate towards implementing an Electronic Document and Records Management System (EDRMS) or Enterprise Content Management (ECM) system, partly in compliance with National and Provincial Archives requirements. Before purchasing the software, the Municipality need to embark on a formal process to increase the chances of a successful implementation.

Implementing a successful Enterprise Content Management system depends on several factors, and following a strict methodology. Failure to do so may result in a waste of money, time and effort. To reduce these risks, the Municipality wishes to procure the services of a service provider who can assist with the process of selection, procurement and implementing an EDRMS/ECM System. As a first Phase, the consultant will determine the readiness of the Municipality to implement an EDRMS/ECM system.

**MINIMUM CRITERIA**

The prospective must:

* Be able to prove experience in similar initiatives
* Have detailed knowledge of applicable international and local standards and best practices in document and records management
* Be familiar with National and Provincial Archives Document and Records Management requirements
* Be recognised by National and Provincial Archives and Records Services as a qualified Service Provider in document and records management

**DELIVERABLES / OUTPUTS**

The Municipality will appoint a suitable service provider to determine its state of readiness to move towards the successful implementation of an Electronic Document and Records Management System.

The service provider should be able to guide and assist the municipality in the following processes:

1. Undertake a risk and readiness analysis of the current environment, including undertaking an environmental scan of the Municipality, including IT skills infrastructure, audit and training requirements, and prepare a state of readiness report.

This will include:

* + Technical architecture (e.g. desired EDRMS topology)
	+ Standard operating environment of the Municipality’s computers (e.g. capacity of existing desktop computers, servers and network
	+ Impact on existing software solutions
	+ Database, software application and web servers (particularly important if the Municipality operates over several geographically distributed sites)
	+ Storage systems
	+ Local and wide area networks, including bandwidth capacity
	+ Remote facilities such as 3G availability
	+ Printers
	+ Document scanners
	+ Barcode readers
	+ Telecommunication services
	+ Backup media, offsite storage, recovery and housekeeping
	+ Replication requirements
	+ Security facilities
	+ Application programming interfaces kits and scripts for systems integration facilities
	+ Viewers for interpreting and displaying images/files in the correct format for online screen viewing
	+ Helpdesk and technical consulting support
	+ Integration requirements
	+ Available IT support
1. Develop an EDRMS functional and technical specification specific to the Municipality, and considering:
	* Usability
	* Price
	* Ability to integrate
	* Technical compatibility
	* Ability to configure
	* Customization requirements
	* All functional requirements
	* Compatibility of project personnel and methodology with municipality culture.
2. Provide close-out report that will detail:

(A) The findings of the exercise including, but not limited to,

1. the need for and current state of policies, procedures, metadata requirements, file plans, and other instruments required in terms of Provincial Archives and Records Service Act;
2. the extent to which management is committed to records management in the municipality and the current records management infrastructure and staffing structure; and
3. the availability of funds for the procurement and implementation of the system

(B) The recommendations on the way forward; and

(C) The estimated cost.

4. Commence implementation of an Electronic Document and Records Management System (EDRMS) or Enterprise Content Management (ECM) System.

**PROJECT DURATION**

The maximum period for the completion of the exercise including submitting a close-out report is 8 months.