

CLARIFICATION FOR SASSETA – SAFETY & SECURITY

RPF No.: RFP/SASSETA/201920127	DESCRIPTION: PROCUREMENT OF RECORDS MANAGEMENT SERVICE PROVIDER UNTIL 31ST MARCH 2025	PUBLISH DATE: 22 MARCH 2020 CLOSING DATE: 12TH JUNE 2020
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CONTACT DETAILS FOR SASSETA CLARIFICATION OF QUERIES

ATTENTION: MR MUSA MAZIBUKO	EMAIL: scm01@sasseta.org.za	CLOSING DATE: 29TH MAY 2020 @ 12H00
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Ref No.	Clause	Clarification of Query	Clarification/Response by SASSETA
1.	Compulsory Briefing Session: There will be no briefing session for this request	Clause 3.2.1.1 mentions a compulsory briefing session?	No briefing session for this bid
2.	Submitting Bids: Closing date: Friday 12 th June 2020	Request extension of one week – proposed new closing date, 19 th June 2020	No extension will be granted
3.	Scope of Work: Provide a system (that will replace the existing service provider system) to create, store, scan and record various physical records into electronic media. The system needs to be a secure and confidential whereby records can be retrieved, scanned, indexed and electronically stored in a manner that is easily and readily accessible.	1) What is the new service provider’s scope, i.e. is it to: <ul style="list-style-type: none"> • migrate data from existing service provider’s system? • manage and process <u>current</u> documents? • backfitting of archived physical records, i.e. scan, index and upload to new system? • All of the above? 	All of the above, SASSETA has a records department that will facilitate the capture, indexing and barcoding, before being sent offsite, however this procedure will have to be refined as it is not done for all units
		2) Where will the new records management service provider operate	

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		.from, i.e. own premises or SASSETA's p.remises, or both?	
4.	Electronic Records Management: Integration with existing file plan, policy and procedure manual	Could these documents be made available to the tenderer now?	Yes apart from the procedure manual and retention periods for the documents
5.	Technical System Requirements: Users must use a User ID and Password to access the system.	How many users will require access to the new system?	20+
6.	Migration Requirements: The data in the current service provider system is migrated and can be usable with all features in the new system;	1) What system is being used by the existing service provider?	Metrofiles DataSTOR
		2) How much data (number of files/data) must be migrated to the new ERMS?	200 000+
		3) What are the commonly used formats stored in the current service provider's system, e.g. PDF, MS Word, Ms Excel, etc.?	PDF
		4) Is there a register (report, index) of documents stored with existing storage provider?	Yes

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		5) What additional work needs to be carried out on these records before migrating these records into the new system?	Quality assurance against scanned and physical, as well as setup of onsite filing system
		6) Or, Is this a migration task only, i.e. download from existing system and upload into the new system with no further work required?	See above
7.	Physical Records Management: There are currently at least 4 000 boxes in the off-site service provider storage (Gauteng - Johannesburg) that will require to be moved to the new service provider off-site location.	1) Just to confirm that these boxes will be stored at the new records management service provider's offsite storage premises? 2) Must these records be scanned, indexed and uploaded into the new system?	Yes, these records must be move by the service provider and should be quality assured against existing database
		3) Is there a register (report, index) of documents stored with existing storage provider?	yes
8.	Consultancy Services and Labour: Provide human resource who will sort, scan, index and upload records.	1) Where will this resource be based? Does SASSETA require this resource at SASSETA's offices, but managed by the new records management service provider?	Yes, this resource will be required in the event of onsite scanning being need or for the scanning of confidential records. They will be based at SASSETAs site upon request

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		2) Workload of this resource(s) - will this resource(s) scan current records only?	Records as required by SASSETA
		3) What are the quantities of records to be scanned and processed?	Quantities vary as they are target based, approxiamatley 8 000 per quarter (estimation only) could exceed
9.	Required Deliverables:		
	<ul style="list-style-type: none"> Set-up onsite filing facility 	Does SASSETA require an onsite filing facility on their premises, or will SASSETA store their records with the new records management service provider at the new records management service provider’s offsite storage facility?	Current records will be stored at SASSETAs premises, older records will be moved to the service provider
	<ul style="list-style-type: none"> Provide a workflow to demonstrate a file request and return inter-filing (file update) and random location functionality and document scanning facility. 	Is this workflow required for when records need to be retrieved/returned that are stored with the new records management offsite storage provider?	Yes this will include the process of scanning and timelines from day of collection to day of upload
	<ul style="list-style-type: none"> Scanning of records – to be completed within three (3) months from appointment 	What is the number of records that must be scanned?	Still to be determined, quantities vary per department
	<ul style="list-style-type: none"> Training of Staff - within 14 days after the deployment and 7 days after the 	Who will be handling the current workload of records?	SASSETAs records team in conjunction with service provider, workload and

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	major changes on the system and the processes.	14 days after deployment – is this referring to the deployment of the new records management system?	responsibilities and can accurately determined at first project meeting
		What is the role SASSETA staff will play in this project? What are the requirements	SASSETA has a records department that will ultimately manage the contract with the service provider and the records generated by the SETA.
	<ul style="list-style-type: none"> File labelling software for alphabetical tabs 	Is this to index and organize hard copy files alphabetically?	Via unique identifier example being an ID number for a learner record
10.	Hardware: <ul style="list-style-type: none"> Handheld Scanners Document Scanners 	1) How many handheld scanners?	10+
		2) How many document scanners?	To be determined based on solution