



**METROPOLITAN**  
NATIONAL SACCO LTD.  
BUILDING BETTER LIVES TOGETHER

## **REQUEST FOR PROPOSAL (RFP)**

**FOR**

**RETENDER**

## **PROVISION OF DOCUMENT MANAGEMENT, WORKFLOW SYSTEM & DIGITIZATION AS A SERVICE**

**November 2022**

**Procurement Reference No: MNS/ICT/MIS/12/22**

Date: 4<sup>th</sup> November 2022

CLARIFICATION AND ADDENDUM No. I

In accordance with the Tender for **“Request for Proposal for provision of Document Management System, Workflow System and Digitization as a Service”** Metropolitan National SACCO issues Clarification I and Addendum No I as follows.

**Clarification No. 1**

Point No	Point	Query	SACCO's Response
<b>SRS related queries</b>			
1.27	Should be able to automatically redact specific patterns on the document, such as Credit card numbers, regardless of location.	Why is this required. It is against the basic principles of DMS.	Please state whether your proposed solution meets or does not meet this requirement and the workaround you propose if it does not meet this requirement.
5.7	The System should allow users to distribute content on a portable, offline stand-alone client with searching capabilities.	Please elaborate this point. What is the objective of this feature	Your solution should enable users to access the content offline with search capabilities. Please state whether your proposed solution meets or does not meet this requirement and the workaround you propose if it does not meet this requirement.
6.7	The System should allow users to distribute content on a portable, offline stand-alone client with searching capabilities.	Please elaborate this point. What is the objective of this feature. We do have an archival feature through which search is also possible. Will that suffice.	No. Archival does not meet this functionality. Please state whether your proposed solution meets or does not meet this requirement and the workaround you propose if it does not meet this requirement.
8.1	The system should be DoD 5015.2 Standard certified. Attach certificate / proof.	Is it mandatory to have certificate. We comply to the DOD standards but do not have certificate. Kindly advice.	Provide documentation of proof of compliance.
8.22	The system should allow users to track location of physical records using RFID.	Is this required from an EDMS/BPM Solution. Because RFID is a hardware tag attached to the document box which is done for physical records management. Kindly clarify	The client requires a solution for the physical tracking of records. Does your solution enable tracking of physical records using RFID? Please state whether your proposed solution meets or does not meet this requirement and the workaround you propose if it does not meet this requirement.

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8.6	The system should be able to manage physical records alongside scanned images and electronic documents. In this regard the system should come with Radio Frequency Identification (RFID) ready tool that will handle electronic tracking of physical records	RFID ready tool is a hardware which is applied on objects/boxes etc. Is this required to be provided by us additional to the EDMS. Xrx can cover this in their scope. Try and get their exact requirement related to this. (Acyutah doesn't provide this)	The system should support as indicated above, RFID hardware and physical records management is not within the current scope.  Please state whether your proposed solution meets or does not meet this requirement and the workaround you propose if it does not meet this requirement.
9.15	The system workflow should support a try-catch activity in the case a workflow receives an error.	Please elaborate this point	The workflow should have error handling capabilities, you can explain the error handling mechanism for your workflow or BPM Platform
14.3	System should have ability to integrate with Security Information and Event Management (SIEM) tools	Can they share which SIEM tools are being used or considered	Please indicate whether your solution supports this functionality and give examples of which SIEM tool it has been integrated with.
<b>General Queries</b>			
	Page Number 45 Workflow It is given 7 workflows from the business processes	Can they share the business process and the workflow steps	This will only be shared with the successful bidder upon signing a contract.
	Page number 16 point 11b  Integration Specialist – Must have integrated with Core Banking Systems, design and development of data models, API integration services, and unit testing of modules/systems.	Which core banking system is currently being used. Can they share the name and version.  Is there any integration with any other third party ERP being used  Is there any stand alone workflow system currently used. If yes please share details.	The SACCO is in the process of selecting and implementing a CBS.  The SACCO is in the process of selecting an ERP.  No standalone workflow system in place. Your EDRMS should have an inbuilt workflow functionality.
	<b>Timelines</b>	Is there any desired timeline in which the project is to be completed? If yes please share	Provide your timeline according to your implementation methodology.

Point No	Point	Query	SACCO's Response
	Page 41 FORM TECH VII (B) – IMPLEMENTATION SCHEDULE TABLE	Please clarify each and every point they have mentioned in the columns.	The table is a guide. Provide information using the table as per your implementation methodology.  Modifying the sample line items and sample table entries as needed to fit your implementation methodology.
	In the system requirement specification (SRS) the software spreadsheets, it says searchable PDF's in various languages.	Does SACCO wants the system to be implemented in any other language also like Ahremic or any local language or only English	English and possibly Swahili.
	On page 26 of the RFP it is mentioned that the required activities include advice.	It is a better option to first get the advice and consultancy on the standard practices of DMS and the requirement or pain areas of SACCO be established, so that a relevant solution can be envisaged which caters to the requirement as a whole and then can propose a solution which actually suffices all the needs of SACCO. Having a rich multi user solution is good to have but also attracts huge cost.	The requirements and mapping of the processes has been done.  Before implementation, the successful bidder is required to review the work done and provide further advice.
<b>Hosting Related</b>			
	Since it was mentioned during the pre-bid meeting the desired solution has to be hosted and provided as a service.	On page 26 of the RFP it is mentioned that the required activities are 1. Advice 2. Analysis 3. Configure on development environment 4. Configure on test environment 5. Configure the product environment If it has to be hosted and managed by the vendor why the above activities are required	Providing the EDRMS as a Service does not mean the implementation life cycle will not be followed.  As part of the implementation activities the bidder is required to do the following: i. Advice on how to improve the physical document registry. ii. Analyze the requirements and Business Processes in relation to document

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			<p>management and configure your EDRMS to fit the client processes.</p> <p>iii. Setup test environment to conduct UAT.</p> <p>iv. Configure the production environment based on UAT results.</p>
	Hosting	What is the minimum year's commitment we are looking at. Therefore, the pricing can be done accordingly.	5 years commitment/minimum contract period.
	High Availability	Since the software as a service is required, what is the high availability uptime required	99.9% availability.
	Disaster Recovery	Is disaster recovery required	You are required to provide DR as a service as part of your solution.

**Addendum No. I**

The following RFP sections are hereby amended (highlighted in red).

The tender submission date has hereby been extended to **25<sup>th</sup> November 2022 at 10hrs** hence the deadline for seeking further clarification is 17<sup>th</sup> November 2022.

**All other bid terms and conditions remain the same.**

ACKNOWLEDGEMENT OF CLARIFICATION NO I AND ADDENDUM No. I

We, the undersigned hereby certify that the clarification is an integral part of our bid and the alterations set out in the Clarification and Addendum have been incorporated in our tender Technical Proposal.

Signed.....

Tenderer.....

Date.....