

MINUTES OF THE VENDOR PRE-BID MEETING FOR EDMS RFP

What we currently have on UNDP E-REGISTRY

- Using digital sender with 3rd party App SOS connected to SharePoint E-Registry Document Library.
- Documents received, Add metadata from the scan.
- Documents stored on the different specified folders within SharePoint E-Registry Document Library.
- Documents shared as a link.
- Workflow runs after the document has been shared.

Expectations from FINANCE

- Vouchers to be archived.
- Scan all supporting documents and archive. Metadata to be defined using voucher numbers.
- Strict Document security and confidentiality required.
- Only specific users to be able to access Document management system e.g. incorporating use of Biometric ID cards when scanning and further allowing uploading to appropriate folder location in the DMS. Confidentiality should start at the point of scanning.
- Vendors should concurrently set up system for daily transactional tasks as scanning of historical documents is ongoing.
- The project starts with Nairobi office then field offices would be later.
- The Physical scanning for the historical documents is to be done by the vendors.
- The vendor should do a demo of how indexing of the documents will be done.

Vendor Query Clarifications

- Documents to be routed via rule based workflows.
- The workflows should provide for flexible routing of the documents.
- Rights on the DMS should be granted to specific users (finance, human resource Registry).
- DMS license to be specified by user on the document management system (based on cost per user). For a start will begin with 20 user license. Also vendors should specify

how licensing works for their proposed EDMS system for additional user bands to enable UNDP plan accordingly for future scalability of the system.

- System should be flexible enough for access by the users at any given time.
- Scanners should be brought by the vendor (high speed for the Earchiving of historical documents).
- Scanning of historical documents estimated to take 3 Months. Please note that UNDP reserves the right to apply liquidated damages for vendor exceeding timeline specified for this work.
- UNDP will take care of all expenses for vendors to travel to Somalia when we are ready to set up DMS in the field offices, however it is recommended for the vendors to get travel insurance for their staff who will be going to Somalia to do the work. The vendor should also include the allowances (if applicable) as part of their financial.
- To provide the vendors with details of the estimate volume of documents stored in the container plus the dimensions of the boxes. This information to be uploaded on the UNDP website.
- UNDP to provide the naming convention for the Documents to vendors.
- The vendors should find a way of controlling duplication of documents on the DMS.
- The vendors can also include indexing of the documents for ease of searching and retrieval as part of the requirement.
- Internal back-up system and the servers to be provided by UNDP Somalia.
- Sample process of workflows to be uploaded on the UNDP Somalia website for the vendors to access.
- Vendors to visit UNDP Website and UNGM site for regular updates on the DMS project.