

## **REQUEST FOR INFORMATION**

**RFI NUMBER: RFI003/INSETA/21**

### **REQUEST FOR INFORMATION ON THE PABX SOLUTION (UNIFIED COMMUNICATION SOLUTION)**

The INSETA calls for suitably qualified suppliers to provide request for information for Provision of the PABX solution (unified communication solution: **Refer to page 3 of 6 number 2**)

**Briefing Session: None**

**Closing Date: 7<sup>th</sup> June 2021**

**For enquiries contact INSETA Supply Chain Management E-mail: [bids@inseta.org.za](mailto:bids@inseta.org.za)**

This RFI is an invitation for person(s) to submit information(s) for the provision of the services as set out in the Specification contained herein. Accordingly, this RFI must not be construed, interpreted, or relied upon, whether expressly or implicitly, as an offer capable of acceptance by any person(s), or as creating any form of contractual, promissory, or other rights. No binding contract or other understanding for the supply of services will exist between INSETA and any Respondents unless and until INSETA has executed a formal written contract with the selected supplier.

**INSETA**

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**REQUEST FOR INFORMATION (RFI)**

<b>RFI NUMBER</b>	<b>: RFI 003/INSETA/21</b>
<b>RFI TITLE</b>	<b>: REQUEST FOR INFORMATION ON THE PABX SOLUTION (UNIFIED COMMUNICATION SOLUTION)</b>

**EXPECTED TIMEFRAME**

<b>RFI PROCESS</b>	<b>EXPECTED DATES</b>
RFI Advertisement Date	<b>01<sup>st</sup> June 2021</b>
RFI Available from	<b>01<sup>st</sup> June 2021</b>
Compulsory Briefing Session Date & Time	<b>N/A</b>
Venue for Briefing Session	<b>N/A</b>
<b>RFI Closing Date and Time</b>	<b>7<sup>th</sup> June 2021 at 11:00</b>
Delivery Venue:	INSETA Ground Floor 37 Empire Road Parktown Johannesburg 2193
<b>Electronics Submission</b>	<a href="mailto:bids@inseta.org.za">bids@inseta.org.za</a>
Contact details	<a href="mailto:bids@inseta.org.za">bids@inseta.org.za</a>

INSETA retains the right to change the timeframe whenever necessary and for whatever reason it deems fit.

Respondents interested in participating must register their interest by providing company name, contact person, telephone, cell number and email address to INSETA, please indicate RFI number on the subject line. This will ensure that any addenda and clarification to this RFI are communicated to all participants.

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## 1. MANDATORY DOCUMENTS

1.1 CSD report (Central Supplier Database)

## 2. DEFINITIONS

- 2.1 “RFI” - a request for information, which is a written official enquiry document encompassing all the terms and conditions of the information in a prescribed or stipulated form.
- 2.2 “RFI response” - a written response in a prescribed form in response to an RFI.
- 2.3 “Respondent” – any person (natural or juristic) who forwards an acceptable RFI in response to this RFI with the intention of being the main contractor should the RFI be awarded through a competitive bid process.

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### 3. CONFIDENTIALITY

All information related to this request for information both during and after completion is to be treated with strict confidence. Should the need however arise to divulge any information gleaned from the service which is either directly or indirectly related to the INSETA, written approval to divulge such information will have to be obtained from INSETA.

The Respondents must ensure that confidential information is: maintained confidential; not disclosed to or used by any unauthorised person; so as to prevent any disclosure or unauthorised use with at least the standard of care that Respondents maintain to protect their own confidential information; only used for the purpose of considering and responding to this RFI; and not reproduced in any form except as required for the purpose of considering and responding to this RFI. Respondents must ensure that: access to confidential information is only given to those of its partners, officers, employees and advisers who require access for the purpose of considering and responding to this RFI; and those partners, officers, employee and advisers are informed of the confidential information section and keep that information confidential. This bid remains at all times the property of the INSETA. No rights other than as provided in this bid and in respect of the confidential information are granted or conveyed to bidder/s

Name of Respondent: \_\_\_\_\_

Physical Address: \_\_\_\_\_  
\_\_\_\_\_

Respondent's contact person: Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax.: \_\_\_\_\_

E-mail address: \_\_\_\_\_

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#### **4. The manner of submission of the RFI**

- 4.1 Respondent shall submit RFI response in accordance with the prescribed manner.
- 4.2 Respondent shall submit one (1) original copy, 1 (one) hard copy and 1 (one) electronic copy (preferably a memory stick) to [bids@inseta.org.za](mailto:bids@inseta.org.za)
- 4.3 The subject line on the email submission must be clearly marked with the responding organisation's name and RFI number and description of RFI.
- 4.4 The USB must be marked with the responding organisation's name and RFI number. The USB must be enclosed in a cover that is also marked with the responding organisation's name and RFI number.
- 4.5 All additions to the information documents i.e., appendices, supporting documentation, photographs, technical specifications, and other support documentation covering suggested solutions etc. shall be neatly bound as part of the schedule concerned.

#### **5. SITUATIONAL ANALYSIS**

##### **5.1 Background**

The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must, in accordance with any prescribed requirements to perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), any other relevant legislation and the Constitution.

##### **5.2. Scope**

The scope of this RFI encompasses acquiring relevant information from industry to enable INSETA to:

- 5.2.1 Identify a suitable solution for INSETA?
- 5.2.2 Assist INSETA to establish User Requirement Statements and Bid Specification/s?
- 5.2.3 This RFI is aimed at gathering relevant information with respect to the capabilities of PABX (Unified Communication) products currently available in the global market, with specific reference to the following:
- 5.2.4 Replacement of the current PABX system (Unified Communication System) at the INSETA Office in Parktown– Johannesburg.
- 5.2.5 Installation and configuration of an alternative Disaster recovery solution.
- 5.2.6 Integration of the PABX solution (Unified Communication Solution) with Microsoft Teams
- 5.2.7 Purchase of IP telephone instruments/devices
- 5.2.8 A scalable solution that will include implementation in other Provinces where the INSETA may have office in the future.
- 5.2.9 Successful installation, commissioning, decommissioning of equipment Sourcing of a Telephone Management System to address INSETA 's requirements.

- 5.2.10 Customisation of a PABX solution (**Unified Communication Solution**) to suitably address INSETA 's requirements, including, amongst others, a cost control and monitoring module, central and local management and reporting of **all future Provincial sites**, ensuring the new system interfaces with existing applications (SAP, Intranet, etc.), and the successful migration of legacy data.
- 5.2.11 Staff adequately trained: Training for technical staff, power user training, and train the trainer.
- 5.2.12 A Master Supply Agreement and a Maintenance and Support contract concluded.
- 5.2.13 Change management processes and implementation
- 5.2.14 Collaboration and integration

## **6. Description of current status**

- 6.1.1 Our Offices at Parktown is using a leased Unify Siemens OpenScape Business X5R PBX System.
- 6.1.2 The INSETA requires a scalable solution to cater for a call centre, recording systems and back-office management tools.
- 6.1.3 Current IT Infrastructure
- 6.1.4 The current IT Infrastructure is hosted at INSETA's Office in Parktown- Johannesburg.

## **6.2 Current LAN**

- 6.2.1 Network Technology
  - a) The network protocol is TCP/IP.
  - b) The LAN is configured for auto (100 or 1000Mbps full duplex depend on the switch model) to the desktop.
  - c) Computer facilities are centralised.
  - d) Operate in 19 Provincial Offices.
  - e) The WAN bandwidth is between 50Mbits and 100Mbits.
  - f) The Network Operating System is Microsoft Active Directory 2016.
  - g) The Current internet bandwidth is 100Mps.
  - h) The INSETA has got a single breakout to the internet at Parktown.
  - i) The INSETA has a Virtual Private Network (VPN) for remote support of external Bidders.
  - j) Domain model: single domain.
  - k) Most servers are connected on Gig Links and Hyper-V servers are connected on 1Gig Links straight to the Core. The Core is 2 HP HPE 2910-48G-PoE located Server room supplying connectivity to +/-150 devices.
  - l) The LANs is configured to host between 100 and 200devices.
  - m) WAN is QoS capable.



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**6.2.2 Desktop Technology**

- a) i5 (3.4 GHz processor 2 Core, 4GB RAM, 500 Gig HD, 17" colour monitor) and above.
- b) Operating Systems: Microsoft Windows 10.
- c) Office Software: Microsoft 365 A5 package.

**6.2.3 Operating Systems**

- a) Examples of current Operating Systems include:
- b) Microsoft Windows

**6.2.4 Security Platforms**

- a) FortiGate Firewall is used.
- b) The following Internet and Email Filters are used:
- c) FortiGate
- d) VPN is used for remote access.

**6.3 Envisaged INSETA environment**

The current PABX environment used at the INSETA needs to be conducive to streamline and effect efficient business processes; to comply with legislation and world class standards. The INSETA employs multiple isolated systems on multiple platforms that do not address all the business needs. These systems need to be unified to enable effective communication throughout the entire INSETA. The respondent must provide an architecture that is cost effective.

<u>REGION</u>	<u>PABX System</u>	<u>No. of Exts.</u>	<u>TELKOM links</u>	-	<u>SLA</u>	<u>End-of-Life</u>	<u>PABX S/WARE Platform</u>	<u>Consoles</u>
Parktown	Unify OpenScape Business X5R	90	1X ISDN PRIs	<b>Check telkom account</b>	Yes	2022	osbiz_v2_R7.1.0_018	1 x OpenScape IP 55G (Switchboard)  1 x PC base switchboard (Business Attendant)  3 x OpenScape CP600 (Executives)  84 x OpenScape IP 35G (Clients)  3 x IP Trio 8500 Polycom Sound Station (Conferencing)  Man3000 TMS (Reporting)



## 7. SCOPE OF SERVICES AND TECHNICAL SPECIFICATIONS FOR RFI REQUIREMENTS

### 7.1 Overview of System Requirement

7.1.1 Based on the above-mentioned detailed information about the INSETA infrastructure, the INSETA requires information on the following systems:

- a) On-Premises Solution
- b) Hosted (Cloud) Solution
- c) Hybrid Solution

7.1.2 The information must comprise of the following for each solution:

- a) Benefits of acquiring each solution.
- b) The risks of acquiring each solution.
- c) The training required: such as train the trainer, super user and operational user training.
- d) Implementation costs, change management- Roll out.
- e) Solution costing
- f) Project approach and proposed methodology
- g) Maintenance and support costs
- h) Call rates to landline numbers
- i) Call rates to Mobile numbers
- j) Call rate to international number

7.1.3 The Replacement of the PABX Infrastructure must include the following requirements.

- a) Provide a unified communication solution integrated with Microsoft Teams.
- b) INSETA wants to make use of the latest generation SIP trunking technology.
- c) The solution must include audio and video capabilities as well as the ability to interface with other related corporate communication platforms such as Microsoft Teams, Microsoft 365 Exchange Online, Microsoft SharePoint, Microsoft Active Directory, etc.
- d) The solution must provide a TMS (Telephony Management System) that is capable of collating data at one central point.
- e) Call center solution with capabilities of recording calls as well as assigning reference numbers or any other suggested solution.
- f) Respondent must provide information regarding Lease Cost Routing or how INSETA can benefit from managing their LCR.
- g) The solution must include costing on Predictive Dialer mechanisms
- h) Information will also be required on Workforce Management tools
- i) **The solution must be capable of performing a Post Call Survey.**

- 7.1.4 Indicate if the solution will be able to integrate with the following applications used in the INSETA.
- a) SAGE 300
  - b) Microsoft SharePoint
  - c) Microsoft Teams
  - d) Microsoft Exchange Online



**8. REQUEST FOR INFORMATION:**

**Bidders are requested provided information against the following:**

- 8.1** Our Offices at Parktown is using a leased Unify Siemens Opens cape Business X5R PBX System, similar and allow for provision of latest technologies.
- 8.2** The INSETA requires a scalable solution to cater for a call centre, recording systems and back-office management tools.
- 8.3** The Current IT Infrastructure is hosted at INSETA's Office in Parktown- Johannesburg.
- 8.4** ***Bidders are required to include comparative pricing of different solutions available in the market.***

**9. GENERAL INFORMATION**

Enquiries in respect of this RFI should be addressed **by email to** [bids@inseta.org.za](mailto:bids@inseta.org.za)  
**All queries MUST be e-mailed.**

**END OF THE REQUEST FOR INFORMATION DOCUMENT**