

**The University of South Africa invites suitably
qualified service providers to participate in a Public
Tender Process to provide the University with
proposals for a Facilities Management System
(Integrated Workplace Management)**

Tender Specification Document

Tender Ref. No:	PT2024/04	Date of Issue:	March 2024
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1. BACKGROUND

The current Facilities Management System was implemented to assist University Estates directorate with the managing of facilities of the institution. UNISA Management Committee approved the renewal of the Facilities Management system for one year on condition that since there were new developments for integrated workplace management systems in the market, the market should be explored, and a public tender process be followed. The current system provides an integrated web-enabled system that consists of the following modules:

- o Real Estate Portfolio Management
- o Portfolio Management
- o Lease Administration
- o Space Management
- o Parking Allocation Management
- o Asset Portal
- o Building Operations
- o On Demand Work (Corrective Maintenance)
- o Preventive Maintenance
- o Service Desk
- o Reservations (Venue Booking)
- o Fleet Management
- o Smart Client Extension for AutoCAD and Revit
- o HEMIS / Valpac
- o Mobile Framework

The system provides a platform which is easily integrated with mobile, IS and ERP systems such as Oracle, SAP, Sage, and others. It can also be integrated bi-directionally with the building information modelling and CAD Design software.

UNISA invites interested service providers who have the capacity to implement and provide a solution which will meet Unisa's business needs. The purpose of the Public Tender is to appoint a suitable service provider to provide Facilities Management System or solutions that are available in the market by requesting quotations of comparable facilities management systems. The Public Tender intends to explore the market for facilities management systems.

Shortlisted Service Providers will be invited to make a presentation on the responses of the Public Tender that are submitted to UNISA. The purpose of these presentation is to provide a question and answer (Q & A) platform on the responses of the short-listed service providers that have submitted to UNISA.

2. PROPRIETARY AND CONFIDENTIAL INFORMATION

All material submitted in response to this tender shall become the property of Unisa. Any confidential information provided by a service provider in response to this Tender will be held in confidence and will only be used for the evaluation of this tender.

3. DEALING WITH THE UNIVERSITY OF SOUTH AFRICA

Service providers must not contact any member of Unisa and / or consultants with respect to queries they may have with this tender. A non-compulsory information session will be held during which it is expected that any queries raised, will be answered. The service provider shall not disclose any such information or specification, whether explicit or implied, to any third party without the written consent from Unisa.

4. NON-COMPULSORY REGISTRATION AND INFORMATION SESSION

Prospective tenderers must read and familiarise themselves with the tender specification before the information session.

Registration Date: 03 April 2024

Time: 11:00 to 12:00

Venue: Link to on Microsoft teams (to be provided on Unisa Website two days before the session).

5. TENDER SUBMISSION AND CLOSING DATE

The original and a soft copy of the tender must be submitted into the official tender box in a sealed envelope located in the **Kgorong Building Security Entrance, Muckleneuk Campus, Preller Street, Muckleneuk Ridge., Pretoria**. Please quote the tender reference number **PT2024/04** on the sealed envelope.

Closing date: 17 April 2024 @ 12:00

Tenders submitted late will not be accepted or considered.

Points will be awarded for Broad-Based Black Economic Empowerment.

The decision of the UNISA Committees on awarding a tender is final.

Unisa reserves the right to appoint, contract with and monitor the performance of any service provider it deems will offer the best service in line with its requirements, although it may not necessarily be the lowest Tenderer. Unisa also reserves the right, in its sole discretion, not to award a tender, to re-advertise a tender or not to award the tender to a service provider who has more than two existing contracts with Unisa.

The tender awarded will be conditional and subject to successful negotiations and signing of a written contract, failing which Unisa reserves the right to withdraw the tender and to award the tender to another Tenderer without repeating the process.

6. MANDATORY REQUIREMENTS

Mandatory requirements will include the following and must be labelled and submitted in the following order. **Failure to comply and submit any one of the documents will disqualify the submission:**

Annexure A1: Attendance of a non-compulsory online information session (to be verified by SCM) where applicable.

Annexure A2: Completed and signed Supplier List Application Form (F25) (www.unisa.ac.za/tenders).

Annexure A3: Resolution to sign on behalf of the tendering unit (www.unisa.ac.za/tenders). Own company resolution will also be accepted.

Annexure A4: Copy of valid SARS clearance certificate to be submitted. SARS pin will also be accepted.

Annexure A5: Copy of company registration documents listing all active directors / members of the company. CIPC company registration document CoR14.3 / Disclosure Certificate.

Annexure A6: Copies of share certificates must be included (in the case of closed corporation's member certificates should not be submitted)

Annexure A7: Pricing template (must be completed in full).

Annexure A8: Reference template Minimum of three recent (not older than 3 years) contactable references from customers to which the tenderer has provided or is providing goods/services that are substantially similar (size, nature & quantity) to the goods/service required. If current references are provided these must be in place for a minimum of 3 years. **Annexure A8 must be completed in full.**

Annexure A9: Technical response template must be completed in full. (The technical response template will be attached to tender submission for mandatory completion).

Annexure A10: Financial Statements

- a. One set (2 years comparative figures) of the most recent audited Annual Financial Statements together with a signed Independent Auditor's Report or a signed letter from the Accounting Officer for Close Corporations must be submitted unless the reporting entity is exempted in terms of the new South African Companies Act from obtaining an Independent Auditor's Report. The exempted entity must then submit a signed Independent Reviewer's report or signed compilation engagement (ISRS 4410) report from any recognised accounting professional body. **The submitted most recent annual financial statement must be within six months of their financial year-end to qualify for evaluations.**

A complete set of Annual Financial Statements including the following:

- *Independent Auditor's Report (Letter from an External Accountant/ Accounting Officer for Close Corporations)*
- *Statement of Comprehensive Income (Income Statement)*
- *Statement of Financial Position (Balance Sheet)*
- *Statement of Cashflows*
- *Statement of Changes in Equity*

- *Notes to the Financial Statements*

No draft, summarized or extracts of financial statements will be accepted.

- b. Where the financial statements of the holding company are submitted, a signed letter be included from the holding company, on their letterhead signed by the CEO/CFO, that they would be liable if the subsidiary defaulted. This must be attached to the financials being submitted. Failure to submit such signed letter will disqualify the tender submission.
- c. The financial statements should be submitted as a separate bound document.

Annexure A11: Unisa General Terms and Conditions to be completed and signed (www.unisa.ac.za/tenders)

7. OTHER REQUIREMENTS

Annexure B1: A valid B-BBEE certificate from a SANAS accredited verification agency. An affidavit certifying their total annual income and level of black ownership will be sufficient for EMEs and QSEs. Failure to submit the above will result in a zero score for B-BBEE.

Note: All documents submitted in support of this tender must be the documents of the tendering unit and may not pertain to different companies or units within a group. As an example, a tenderer cannot submit its own B-BBEE certificate, but the SARS certificate of its holding company.

8. PRICING

- ❖ All pricing must be quoted in South African Rand (ZAR) including VAT.
- ❖ The pricing **must remain valid for 120 days** from the closing date of the tender.
- ❖ In instances where the contract period is extended beyond the initial 3 years it is accepted that the prices will remain fixed for the first 3 years.
- ❖ Pricing / costing template **must be completed** (Annexure A7)
- ❖ Any pricing not included in the pricing template will not be considered.
- ❖ Foreign exchange rate used to be indicated (if applicable).

Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his tender, and any variance will render the contract null and void.

9. PAYMENT TERMS

The payment terms of the University are 30 days after receipt of goods and services and upon receipt of the required documentation. **No upfront payments will be considered.**

10. SUB-CONTRACTING

The University of South Africa will **NOT** accept Sub-contracting.

11. JOINT ARRANGEMENTS

The University of South Africa will **NOT** accept joint arrangement proposals.

12. EVALUATION CRITERIA

Pre-qualification:

Only tenderers that meet all the mandatory requirements including the financial evaluation will proceed to stage 1 of the adjudication.

Stage 1 –Evaluations:

Phase 1: Mandatory technical evaluations

DESCRIPTION		REQUIRED
<p>Phase 1: Mandatory technical evaluation</p> <p>Service providers will need to comply with all the technical specifications as in Annexure A9 Technical Response Template, before being considered for stage 2. Service providers who do not meet all specifications will not be considered.</p>		<p>Comply 100% with all the listed specifications</p>
<p>SPACE MANAGEMENT</p>		
1.1.	The system must be able to generate and maintain accurate space information in alphanumeric and CAD format that is stored in a central repository and can be accessed and amended by key stakeholders over a corporate network.	
1.2.	The system must be able to classify the space in line with the DHET space classification system.	
1.3.	The system must be able to extract the relevant data from the Database in the correct format, allow for the manipulation of the data in Excel, and the bulk uploading of date back into the Database.	
1.4.	The system must be able to analyze building performance and efficiency.	
1.5.	The system must contain business rules to ensure the validity of the data.	
1.6.	The system must be able to link spaces to responsibility Centers.	

1.7.	The system must be able to integrate with other systems used by the University such as the HR Oracle system and the Finance Oracle system (Cost centers)	
1.8.	The system must enable the updating and editing of information with regards to the areas and size, classification, allocation, and utilisation of space.	
1.9.	The system must be able to visually represent data on floor plans. Circulation of these in electronic format for verification must be possible.	
1.10.	Web-based interactive forms to manage data changes and reporting must be possible.	
1.11	The system must be able to accurately calculate the proportionate allocation of common areas and non-assignable space by Responsibility Centres.	
1.12.	The system must be able to track space usage over time.	
1.13.	The system must be able to develop internal space charging, which will help the University to rationalize its use of space.	
1.14.	The system must assist accurate planning based on current space utilisation and future growth projections.	
1.15	System must integrate with spatial data (GIS) commonly supplied by Architects for future planning and automatic updates to renovated and new areas.	
1.16.	The system must be able to retrieve rooms available for each building and the sizes of the rooms, including common areas, custodial space, and should include the facilities of the space (no of seats, projectors, air-conditioning, whiteboards, smart boards, etc.	
1.17.	The system must be able to provide Space and Occupancy reports.	
1.18	The system must be able to generate flexible reports both for the purposes of planning and management information (history and current). This implies that changes to space need to be date-stamped to determine the changes over time.	
1.19	In case of changes required by the client to re-design the floor plan, the system must be able to update as the layout get changed.	
1.20	The system must be able to upload assets/furniture allocated to that office or to that person to assist with annual assets stock take.	

1.21	The system must be able to tie Human Resources data to FM data by extracting information for the HR database and write back to the HR database. Updates on the central HR database must prompt updates to the FM system.
1.22	The system must be able to create an organogram of at least 3 tiers from the HR database and allow for the allocation of spaces to these portfolios, departments, and directorates.
1.23	The system must be able to provide industry-accepted methods for measuring employee space usage, including the Average Area per Occupant report.
1.24	The system must be able to track an employee's primary and satellite location.
1.25	The system must be able to track employee room changes and vacancy rates over time, generate Occupancy Plans, and Highlight Occupiable Vacant Rooms.
FLEET MANAGEMENT	
2.1	All Unisa staff members must be able to access the system online as requestors
2.2.	The system must be able to integrate with the HR Oracle system in order to access relevant personnel data.
2.3	An application for booking must first be approved by the requestor's manager (workflow) before the vehicle officer (administrator) can issue the car.
2.4.	When a booking is being made the system must automatically request and record driver license details. Provision must be made for attaching a copy of the requestor's driver's license.
2.5.	Traffic fines must be flagged on the database against the driver of the vehicle.
2.6.	The system administrator must be able to flag accidents against the driver involved and the description of the accident must be recorded on the system.

2.7.	Requestors must be able to search for a specific vehicle by type (e.g., 14-seater or sedan) and the date and length of time the vehicle is required.	
2.8	The system must be able to search by location, E-tag, body type for cars that are available per date.	
2.9	The system must keep track of vehicle status which must include availability and 'due for service'.	
2.10.	The system must send a notification for a vehicle that has passed its booking period to the vehicle officer (system administrator).	
2.11.	Only vehicle officers (system administrators) should be able to change status of booking.	
2.12.	Requestors must be able to cancel a booking.	
2.13.	Requestors must be able to change a booking.	
2.14.	The system must generate a confirmation e-mail notifying the requestor of the status of the request	
2.15.	The system must be able to record and alert that there have been regular checks to ensure that vehicles are operational and safe. Staff to perform checks based on pre-defined checklist. The vehicle attendant who performed an inspection must be logged against that particular vehicle.	
2.16.	If there are no fleet vehicles available, then the requestor must have an option to either book a vehicle through the travel agent or use their own vehicle.	
2.17.	The system must provide incident and damage reports.	
2.18.	The system must flag the expiry date of annual license and automatically report to vehicle administrator.	
2.19.	The system must provide reports to be used for cost recovery from each department (RC) for the car usage monthly.	

2.20.	The system must be able to provide reminders for the regular servicing of vehicles based on vehicles' specific servicing requirements.	
2.21	System must make provision for recording logbook data	
2.22	The system must provide means to remind the user of the booking made per email one day before.	
2.23.	<p>The system must be able to generate the following reports:</p> <ul style="list-style-type: none"> • Usage per department/ per user • Kilometre usage per year • Petrol usage per vehicle • Tollgates fees paid. • Reports indicating vehicle usage. • Accidents Reports • Reports on the cars which were booked but not used. 	
2.24	Fleet chargeback for fuel and repairs to be implemented in accordance with UNISA's Banking partner / service provider. Banking service provider is usually renewed/changed every +-5 years.	
PARKING ALLOCATION		
3.1.	Unisa staff members must be able to submit applications via the system. All staff members must be able to access the system online as requestors.	
3.2.	Available parking must be displayed for selection on the web form. It must be possible to indicate 3 choices between the available parking areas.	
3.3.	Allocations must be done in ascending numerical order. If for example carport parking is selected, only available parkings of type "Carport" in the indicated area of choice must be displayed.	

3.4.	If all fields are completed the application data must be stored and a confirmation letter of a successful application must be generated by the system for display with an option to print or download as well.	
3.5.	The system must integrate with the HR system to validate allocations in terms of post level.	
3.6.	The system must allocate parking in accordance with a calculated ranking (points) and the indicated preferred parking area (e.g. P1, East or P1 West), starting with the first choice.	
3.7.	If none of the preferred parking bays are available and employee indicated that another parking bay can be allocated, any other available parking can be allocated.	
3.8.	After parking bays have been temporary allocated, an email must be sent to applicants requesting them to accept the parking bay. Applicant must indicate that they have accepted the allocated parking before the request is finalized.	
3.9.	Staff members must be able to submit a request to change an allocated parking bay to a more suitable parking. This application must be stored on the waiting list and be allocated in accordance with the same rules as explained above with the exception that staff members with no allocated parking will have preference above those who want to change to a new parking bay.	
3.10.	The system must integrate with the HR Oracle and Finance (Payroll).	
3.11.	Staff must be able to cancel a parking site through the system and the payroll system and available parking database to be updated upon this action.	
3.12.	The system must allow for certain types of parking to be handled differently, e.g. If staff on post levels 1, 2 or 3 resigns, payroll must be updated, but the parking bay must not become available for reallocation.	
3.13.	The system must verify from the HR system whether a staff member is liable to apply for parking.	
3.14.	The system must Integrate with the Finance system for the deduction of parking fees.	

3.15.	It must be possible for the system administrator to reserve parking not to be allocated to any individual.
3.16.	Parking areas and bays must be linked to a campus. The system must accommodate more than one campus with parking areas and bays, e.g. Sunnyside or Florida. A parking must carry a flag to differentiate as follows: Reserved for Disabled Persons Reserved for Professors working from Home. Reserved for post level 1-3 Allocated Available
3.17.	The system must create parking discs.
3.18.	A parking bay must also be defined in terms of a parking type, i.e. Undercover parking, Carport parking, Shade net parking and the system must make provision for the different fees depending on the type.
3.19.	A bay must also be defined in terms of the section of the area e.g. P1 – East/West/ /North/South.
3.20.	The system administrator must be able to compile all letter layouts and informative messages on the system.

VENUE BOOKING SYSTEM

a) Introduction

University Estates needs an online venue scheduling and booking system to enable staff to book venues for Learner Support, meetings, and other activities.

b) Assumption

All Internal users (i.e., academics, administrators, regional office personnel, etc.) logging onto the venue booking system must be allowed (through access) to make use of the venue booking system. All external users must be able to book venues through an administrator. The system must be available to multiple users and have different access/security levels.

VENUE BOOKING (RESERVATIONS)

4.1.	Unisa staff members (requestors) and the reservation officers (administrators) must be allowed to make or add bookings online.	
4.2.	Requestors must be allowed to submit changes to their own bookings only, in line with terms and conditions of the reservation office.	
4.3.	Requestors and administrators must be able to do multiple bookings.	
4.4.	Multiple bookings on the same date, but not the same time, for a single venue, may be allowed.	
4.5.	All bookings made by requestors are provisional bookings, until the bookings have been confirmed by an administrator (Add indicator to booking to see if it was confirmed).	
4.6.	When a requestor adds a booking, an email must go out to administrator for booking to be confirmed.	
4.7.	Bookings may not be updated by a requestor once it was confirmed by an administrator.	
4.8.	Only the administrators should be allowed to change / update bookings once they are confirmed.	
4.9.	All bookings can only be made when a venue is available.	
4.10.	No double bookings should be allowed on the system.	
4.11.	Only when schedule has been confirmed and administrator selects the e-mail option, should the email be sent out.	
4.12.	All confirmation emails should be sent out immediately, followed by reminder a week before venue is to be used.	
4.13.	Booking confirmations must be automatically e-mailed to requestors and administrators. (Must be over-ridden when needed).	
4.14.	The following must be included in the confirmation e-mail to the requestor booking the venue: <ul style="list-style-type: none"> • contact number and email address of the requestor who booked the venue as well as the responsible person of the additional venue(s) • date of booking, time of booking. 	

	<ul style="list-style-type: none"> • Reference number • Capacity of the venue • Other details, such as campus, building name, office number, equipment etc. 	
4.15.	An email link must be available on the website, to inform the administrators about any changes or resource needs	
4.16.	By default, provisional bookings should be held for 10 days, public holidays and weekends should be included in the provisional holding of bookings.	
4.17.	The administrator must be able to over-ride access to the booking system.	
4.18.	Registration for the service will be a prerequisite for external users. However, access to the system must be in line with the single sign- on policy of UNISA.	
4.19.	The system must allow users to book future dates and return an error message if past date is selected on the calendar.	
4.20.	The system must make provision to book a venue for specified time range. This means that the system needs to recognize cycles that are opened and closed by the administrator in order to facilitate timely bookings.	
4.21.	Only meetings with a date of the current date or later can be amended.	
4.22.	All bookings will have a provisional status until accepted by an administrator. A provisional booking will be removed from file either when the provisional hold period expires, or when the booking date and time has passed.	
4.23.	The booking requestor / administrator should be authorized to amend or delete all bookings on file (normally, only a user's own bookings can be amended).	
4.24.	All bookings must have the option for a 30min period between bookings. (This is to allow for setup for the venue and equipment, etc.).	
4.25.	All available venue types, including venue details must be listed to the user. The system must return venues that match the user's selection.	
4.26.	When making a booking, the requestor should be allowed to add a note to the administrator indicating resources required.	

4.27.	The start date should be entered by selecting from a calendar. The system should select / indicate the next available time in the event of the requested time being unavailable.	
4.28.	If an amendment is being processed, then the original times must be selected automatically.	
4.29.	The system should allow the user to view which venues are available for the date requested, including venue details such as size, equipment etc.	
4.30.	The system must be able to issue a sequential booking number as confirmation.	
4.31.	The system must be linked to the Finance system, to enable financial monthly reporting. All activities to link to the financial system. Must be able to check the history of active venues and its financial participation per venue. A penalty fee must be issued for late cancellation. A full priced is charged for an unused booking.	
.	The system must have a drop-down menu, which classifies room according purpose. Example of groups are: Satellite broadcasting facilities Tutorial room Boardroom (meeting room) Discussion rooms DVD (Video) room	
4.33.	Requestors must be able to check the availability of venues. The screen display must differentiate between <ul style="list-style-type: none"> • Bookings which have not already started • are due to start within the next 15 minutes. • which have started up to 5 minutes earlier • all others. 	
4.34.	Venue Availability Report A graphic display of venue availability to be shown for a specific date range selected: Free times booked times. The graph can have the date moved forwards or back, but not earlier than the current date. User booking, Dates of booking, Duration of bookings, Regions booked, How many days of bookings per month per venue How many hours booking per month per venue. Total utilization / booking per venue per month (reason for booking venue)	

	<p>Administrator Report The system should report all bookings with caretaker action required. This can be room set-up, a seating plan or a resources requirement.</p> <p>The display should be over a variety of date options, and the results may be displayed in either date, or venue, sequence. Once displayed, the report should be printable / printed.</p> <p>The system must disseminate booking information for different campuses and building to security personnel.</p> <p>A report to display how many venues booked but not used per user.</p> <p>Management reports such as – Income report per venue, or per RC must be possible.</p>	
4.35	<p>Additional requirements:</p> <ul style="list-style-type: none"> • Integration with Outlook • Full workflow functionality in order to track and trace processes and to allow users and administrators to determine where in the process the booking are. • Search functionality • Integrate with HR Oracle & Finance Oracle • Full integration with the Space Management system • Full integration with the Assets system to retrieve assets belonging to venues. • Integrate with single sign on (Portal) and other systems maintained by ICT. 	
4.36.	<p>Resources Report This system should report all bookings with its required Resources.</p> <p>The display should be over a variety of date options, and the results may be displayed in either date, or venue, sequence. Once displayed, the report may be printed.</p>	
4.37.	Only Administrators and RC Management are allowed to generate reports.	
4.38	Not all the venues are bookable.	
4.39	If the booking request is not attended within 5 days, it must escalate to the next administrator.	
4.40	Function sheets per day, per week, per month or yearly must be able to be viewed and be able to be distributed to the relevant personnel.	

BUILDING MAINTENANCE	
A. Service Desk	
5.1.	All staff members must be able to access the system online as requestors.
5.2.	On access, notes (to be provided) must display to provide staff with relevant information.
5.3.	<p>Examples of notes to be displayed:</p> <p>Emergency phone number: <u>Only</u> for power failures and water leaks: 012 429 3050 for Pretoria Campuses and 011 471 3241 for Florida Campus. For telephones log a request on ICT Self Service.</p> <p>For any computer related problems log a request on ICT Self Service.</p> <p>For keys, email keys@unisa.ac.za for Pretoria and for Florida Campus email Facilitycare@unisa.ac.za .</p> <p>For lifts, phone 012 429 3276 or 012 429 3299 during office hours or Security at 012 429 6262 after hours. For Florida Campus call 011 471 2249 or 083 631 5655 for after hours.</p> <p>For the removal of redundant or unused furniture phone the furniture store at 012 429 2740. 011 471 3241 for Florida Campus.</p>
5.4.	On clicking on a 'Continue' button the service request form must open.
5.5.	Create Service Requests.
5.6.	The service desk application must integrate with the HR Oracle system to populate the personal and contact detail fields of the requestor.
5.7.	On entering a valid staff number the following details of the requestor must display: Name; Phone number; Email address; Building; Department; Floor and Room/office number.
5.8.	All data fields are compulsory (details of requestor)
5.9.	The requestor may change information in the data fields (details of requestor)
5.10.	An alternate contact detail field must be a compulsory entry field. A name and phone number must be entered.
5.11	The responsibility centre (RC) code of the requestor's department must be a compulsory entry field.
5.12	The requestor must select campus (site) and building from menu. (This should include all buildings and campuses nationally)

5.13.	The requestor must select a service group.	
5.14.	The requestor must select a service from the selected service group.	
5.15.	The requestor must enter a description of the repair or service required in a free text box.	
5.16	The requestor can select more than one service from one service group,	
5.17.	The service requests are routed to a supervisor per service group and per campus.	
5.18	The requestor must be able to book a service for a specific day.	
5.19	There must be a field for clients to indicate the suitable time for maintenance staff to come and attend to the request.	
5.20	Service level agreements (reaction times) and priorities are allocated to each service.	
5.21	The supervisors assign the service requests to a worker or group of workers to complete.	
5.22.	The supervisors update the progress status of the service requests.	
5.23	The supervisor or helpdesk administrator closes a resolved service request.	
5.24.	Service requests that are not resolved within the service level agreement timeframes are escalated to the appropriate supervisor / manager / director.	
5.25	A document attachment function must be available for users to attach any relevant documentation to the service request.	
5.26	All service requests must receive a reference number (job number).	
5.27	On submitting the service request the user must receive an email with the service request reference number and an estimated completion time / date.	
5.28	The Service Desk administrator can reject a service request if more information is needed, or UE is not the service provider for the requested service. This should allow for the service request to be redirected to the relevant work team by an administrator.	
5.29	More information can be obtained via phone or email and the text field can be updated by the Service Desk administrator.	

5.30	The system must allow the Service Desk Administrator or user to continuously provide the requestor with feedback on the reported job.
5.31	A tick list must be provided with standard feedback responses, e.g.: Spare parts on order – waiting time [1] / [2] / [3] weeks. New items on order – waiting time 2 weeks. Contractor on site Order submitted to external contractor – waiting time 2 weeks. Responded to call, staff/office not accessible. In progress Free text field
5.32	The Service Desk system must have a feedback questionnaire to allow clients (the requestors) to give feedback immediately after the job has been resolved. (optional)
5.33	The Service Desk administrator should be able to view a report detailing regular jobs performed e.g., Electrical, Plumbing, painting etc., which building is regularly giving problems and offices that have been attended to, turnaround time, clients feedback report and the man hour spend per job, names of staff members allocated and completed a particular job per month.
5.34	1. Daily Reports 1.1 New requests logged – sort/filter by service type, service, technician. 1.2 Open requests - sort/filter by service type, service, technician 1.3 Closed requests - sort/filter by service type, service, technician. 1.4 Age Analysis of requests - sort/filter by service type, service, technician.
5.35	2. Weekly/Monthly Reports 2.1 Total number of requests logged - sort/filter by service type, service, technician. 2.2 Total number of open requests - sort/filter by service type, service, technician 2.3 Total number of closed requests - sort/filter by service type, service, technician 2.4 Average response time per request - sort/filter by service type, service, technician
5.36	3. Yearly Reports Activity Based Costing driver data: 3.1 Service requests per Responsibility Centre (RC)
5.37	4. Exception reports 4.1 Standard response time exceeded – list per service, service type, technician. 4.2 List of 'Other' requests.

5.38	The Service desk system should provide an easy-to-use, graphical interface for planning and scheduling on demand work.	
5.39	If a request requires approval from a line manager (based on the SLA) a workflow rule should be used to escalate the request.	
5.40	Requestors must be able to track the response to their requests in a personalized interface. Each status change must be communicated via an email by the system.	
BUILDING MAINTENANCE		
B. Equipment Register and Preventive Maintenance		
5.41	The system must provide for an equipment register with the following fields: Campus/Site Building name Building number Main equipment number Description Capacity/size Location/ Room number Make Model Serial number Date of installation Operational status Expiry date of warranty Lifespan of equipment	
5.42	The system must allow the addition of sub-equipment numbers linked to the main equipment number.	
5.43	The system must allow an employee number as well as the work-order/job number to be linked to an equipment number for every work performed on that particular equipment.	
5.44	The system must also allow for the creation of unique contractor numbers to be also linked to every work order created for a contractor or a project number.	

5.45	The system must create work orders/job numbers based on a request submitted and allow for proper classification of maintenance discipline for ease of job allocation to correct resource.		
5.46	The system must generate planned maintenance schedules based on determined maintenance strategy for various equipments immediately when equipment is activated on the system.		
5.47	The system must keep history of every activity that is done on the equipment including sub-equipment numbers for the longest period possible or software allows.		
5.48	The system must be able to store the (Original Equipment Manufacturer) OEM Manual/s or important information extracted from the manual/s as classified important by the user.		
5.49	The system must also keep and store maintenance plan information which must be easily interfaced with equipment registration and activation onto the system.		
5.50	The system must keep and store preventive maintenance (PM) work procedures which will be easily accessible to technicians and other users, and which can be attached to a job-card/work order for a certain PM to be executed.		
5.51	The system must be able to calculate the total cost of maintenance on an equipment per request taking into consideration the hourly rate of the resource executing maintenance as well as the actual cost of travelling and material used in order to allow for cost analysis per equipment maintained which will aid the decision making when replacement of equipment is done.		
5.52	The system must allow the user to draw up history reports based on a particular type (e.g. PM's, failure or breakdowns etc.) in either a graphic format or table format and also provide the user with the mean time between failures		
5.53	Based on the information provided a reminder must alert the custodian of the equipment that is nearing its end of life. This information must be made available as a spreadsheet report for planning and budgeting purposes.		
5.54	The Preventive Maintenance (PM) application must be able to provide an intuitive interface for creating and modifying PM procedures, detailed steps for those procedures, and resources for each step.		

5.55	The user must be able to assign defined procedures to specific equipment or locations.		
5.56	Users must be able to generate work orders for preventive maintenance (PM) work requests according to a set of rules.		
5.57	Users must be able to create schedule rules for all equipment – procedure or location – procedure combinations. The system must use the schedule rules to create PM work orders that contain all the information needed to perform the maintenance work, at the time that the work is needed, with the correct resources to get the job done.		
5.58	Users must be able to define the date range for work orders to be generated, filter the set of work orders to only the criteria needed, and group work requests into work orders based on parameters, such as site, equipment standard, or a pre-defined grouping code. In addition, users must be able to define rules to automatically generate work orders for specific recurring intervals.		
5.59	Users must be able to assign pre-defined SLAs to preventive maintenance requests. The SLAs must automatically route the work to the relevant person/section, enforce rules for response times and generate work requests.		
5.60	Users must be able to update actual costs or hours a worked before closing out work orders.		
PORTFOLIO REQUIREMENTS			
1	<p>Web-based Portfolio Management helps streamline data collection and analysis by accurately aggregating individual portfolio items to create a consolidated portfolio view. The application tracks current and projected holdings, leased versus owned space, building.</p> <p>cost performance data, and more, to enable insightful planning and execution. Drill-down capabilities, graphical and geographic dashboards, KPI charting, and personalized views also help users visualize and analyse data to make fact-based decisions on the portfolio's ability to fulfil the organizational mission.</p>		

LEASE ADMINISTRATION REQUIREMENTS

- | | |
|---|--|
| 1 | Web-based Lease Administration provides a centralized repository, flexible dashboards, automated alerts, and more.

Deploying the application will help streamline data entry, automate lease information-gathering and management, and improve analytic capabilities, all while providing a high service level at reduced cost. |
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SMART CLIENT EXTENSION for AutoCAD and Revit REQUIREMENTS

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| 1 | It connects AutoCAD/Revit to a database and allows for bi-directional transfer of data along with a 2D/3D representation of space. |
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HEMIS REQUIREMENTS

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| 1 | HEMIS application takes the every-day space data and turns it into HEMIS reports as required by the DHET annually. It aims to reduce the time spent collating these reports to days instead of months. |
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MOBILE FRAMEWORK REQUIREMENTS

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|---|---|
| 1 | Mobile Framework delivers a new breed of secure, easily configurable, and customer-responsive apps, providing accurate facilities information when and where it is needed. Creates mobile apps once which will run on a variety of late model, high-end mobile devices. And new technology makes your data—including photos, campus plans, and floor plans—interactive, so that any authorized user can quickly locate spaces, people, assets, and tasks. |
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ASSET PORTAL REQUIREMENTS

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| 1 | Asset Portal is the application for managing assets and was designed to provide a Web-based method of developing asset data, as well as a Web-based portal into asset data that you developed in a Client/Server. It includes tasks that focus on establishing fundamental data about your office, telecom, and facility equipment, and furniture-- where the furniture or equipment is located, the division, department and employee using it, its identifying code, the item's classification or standard, and its condition. If you enter cost information for your equipment and tagged |
|---|--|

furniture, such as the purchase price, salvage value, install date (for equipment) and delivery date (for furniture), you can calculate depreciation. The features of Asset Portal are available in Asset Management and Enterprise Asset Management.

FURNITURE REQUEST REQUIREMENTS

Role	Requirement description
Business Unit/Department /College	<ul style="list-style-type: none"> • Once the requestor selects the building name/number the remaining fields should automatically populated by the system. • User must be able to drop down and select the item. • The requestor can request for more than one staff member if is not for medical reasons, and the requests must be for the same building and RC code. • All the fields must be pre-populated and must be drop downs if field has multiple items. • The motivation field must be typed by the user. • Refer Page 1 in the Addendum for the required fields, application for nonmedical reasons. • All System the fields must be completed, if incorrectly filled, the system must warn the user with correct message. • Additional rules for medical request, • One staff member per application, if is for medical reason. • Motivation field is compulsory if is for medical reasons. • A proof of medical certificate document must be attached. • Refer to 1.8 in addendum on form 2 for medical fields. • No inspection for medical condition.
Facilities Management System	<ul style="list-style-type: none"> • Once the user submits the application, the System Furniture request generate the furniture request number/ service request for the application and email it to the requestor.
University Estate (Property Management	<ul style="list-style-type: none"> • Print each request for inspection purposes. • Update the requested items on the system after inspection. They will tick yes/no field and write comments next to the ticks.

Facilities Management System	<ul style="list-style-type: none"> System to generate report based on recommendations and send it for approval according to values in line with the delegation of authority 		
University Estate (Property Management)	<ul style="list-style-type: none"> System to generate report based on recommendations and send it for approval according to values in line with the delegation of authority. Send communication to the requestor containing the items which are approved and those that are not approved for purchasing. approved for purchasing. 		
University Estate (Property Management, Deputy Director, Director, ED, and VP)	<ul style="list-style-type: none"> The University Estate follow the HR signing powers for approving the requested furniture. R1-100000 approve by <ul style="list-style-type: none"> the director. R101000-R500000 approved by the\ <ul style="list-style-type: none"> Executive director. R501000 and more signed by vice principal. 		
Property Management	<ul style="list-style-type: none"> Property Manager sends the RFQ to SCM 		
SCM department	<ul style="list-style-type: none"> Finalise purchase order 		
University Estate (Property Management)	<ul style="list-style-type: none"> Send emails 5 days before delivery to asset management and staff members that will receive furniture. System to generate furniture delivery schedule per PO. Property Manager to complete asset numbers on delivery schedule 		
Staff Member (Receiving the furniture)	<ul style="list-style-type: none"> Receive the furniture and sign for the delivery 		
Assets Management	<ul style="list-style-type: none"> Receive the signed delivery schedule and update the Asset management System. This process is not necessarily in the Facilities Management System. 		

WORKFLOW

To ensure all task related to all modules of the system are managed using proper approval processes. This is critical when tasks are created and reused by multiple parties. To ensure processes are transparent, auditable, efficient, and automated.

1	Users need to be able to route tasks or processes along predefined routes for review or approval.
2	Users need a functionality to allow for the assignment and tracking of tasks via a particular hierarchy by setting timelines for completion of such tasks.
3	Users need to be notified via email when documents/ requests are being routed from one participant to another for approval.
4	The solution needs to integrate with HR Oracle, HR Finance and spatial data.
5	Customisable workflow functionality is needed for document/ request approvals, e.g. assigning workflow to groups.
6	Task allocation must display date stamping.
7	Workflow functionality in order to track and trace processes.

PORTAL REQUIREMENTS

1	The system must provide Unisa staff with a single point of access to the modules of the Facilities Management system.
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NON-FUNCTIONAL REQUIREMENTS

1	The system should be scalable to accommodate increasing workloads, additional facilities, and growing data volumes. It should be able to handle future expansion without significant impact on performance.
2	The system should enforce strict access controls, encryption, and data protection measures to safeguard sensitive information such as equipment inventory, maintenance records, and customer details. It should comply with relevant security standards and regulations.

3	The system should support seamless integration with other systems such as financial management, HR, and procurement systems. This allows for data sharing, automated workflows, and streamlined processes.		
4	The system should have robust reporting and analytics capabilities, allowing users to generate customizable reports, track key performance indicators (KPIs), and gain insights into facilities management operations for informed decision-making.		
5	The system should be able to handle a large number of concurrent users, process requests efficiently, and provide quick response times for various operations such as asset tracking, work order management, and reporting.		
SYSTEM INTERFACES			
1	ORACLE		
2	SAP		
3	Sage		
4	CAD, it provides Facilities Management System with design software		
5	Building Information Modelling		
6	The system must integrate the usage cost with Oracle GL		
ADDITIONAL REQUIREMENTS			
An integrated, web-enabled system comprising all modules.			
Integration with Microsoft Outlook and Office 365			
Search functionality			
Workflow functionality			

Integrate with HR Oracle & Finance Oracle		
Integrate with Microsoft Active Directory		
Integrate with single sign-on (Portal) and other systems maintained by ICT.		
Data migration of legacy systems		

Phase 2: Demonstration and Presentation.

The shortlisted tenderers will be required to attend a mandatory demonstration and presentation session of their solution on how it addresses all the UNISA requirements as documented in Annexure A9 Technical Response Template.

Stage 2:

CRITERIA		POINTS	
Price $P_s = 75 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$ Where: Ps = Points scored for price of tender under consideration Pt = Rand value of tender under consideration Pmin = Rand value of lowest acceptable tender		75	
B-BBEE B-BBEE score to be taken from valid B-BBEE certificate provided		25	
a	B-BBEE LEVEL	Points Allocation (10)	10
	Level 1	10	
	Level 2	9	
	Level 3	8	
	Level 4	5	
	Level 5	4	
	Level 6	3	
	Level 7	2	
b	Black Ownership	Points range	8
	51% to 70%	6	
	71% to 99%	7	
	100%	8	
c	Female Black Ownership	Points range	3
	30% to 50%	2	
	51% to 100%	3	
d	Youth Owned	Points range	2
	25.1% to 50%	1	
	51% to 100%	2	
e	People Living with Disabilities	Points range	2
	25.1% to 50%	1	
	51% to 100%	2	
TOTAL:		100	

13. TENDER SPECIFICATION

The Facilities Management System should be able to provide all the functionality and capabilities as outlined in the requirements below. The below tables have been separated according to the specific facilities management module specifications.

SPACE MANAGEMENT	
1.1.	The system must be able to generate and maintain accurate space information in alphanumeric and CAD format that is stored in a central repository and can be accessed and amended by key stakeholders over a corporate network.
1.2.	The system must be able to classify the space in line with the DHET space classification system.
1.3.	The system must be able to extract the relevant data from the Database in the correct format, allow for the manipulation of the data in Excel, and the bulk uploading of data back into the Database.
1.4.	The system must be able to analyze building performance and efficiency.
1.5.	The system must contain business rules to ensure the validity of the data.
1.6.	The system must be able to link spaces to responsibility Centers.
1.7.	The system must be able to integrate with other systems used by the University such as the HR Oracle system and the Finance Oracle system (Cost centers)
1.8.	The system must enable the updating and editing of information with regards to the areas and size, classification, allocation, and utilisation of space.
1.9.	The system must be able to visually represent data on floor plans. Circulation of these in electronic format for verification must be possible.
1.10.	Web-based interactive forms to manage data changes and reporting must be possible.
1.11.	The system must be able to accurately calculate the proportionate allocation of common areas and non-assignable space by Responsibility Centres.
1.12.	The system must be able to track space usage over time.

1.13.	The system must be able to develop internal space charging, which will help the University to rationalize its use of space.
1.14.	The system must assist accurate planning based on current space utilisation and future growth projections.
1.15	System must integrate with spatial data (GIS) commonly supplied by Architects for future planning and automatic updates to renovated and new areas.
1.16.	The system must be able to retrieve rooms available for each building and the sizes of the rooms, including common areas, custodial space, and should include the facilities of the space (no of seats, projectors, air-conditioning, whiteboards, smart boards, etc.
1.17.	The system must be able to provide Space and Occupancy reports.
1.18	The system must be able to generate flexible reports both for the purposes of planning and management information (history and current). This implies that changes to space need to be date-stamped to determine the changes over time.
1.19	In case of changes required by the client to re-design the floor plan, the system must be able to update as the layout get changed.
1.20	The system must be able to upload assets/furniture allocated to that office or to that person to assist with annual assets stock take.
1.21	The system must be able to tie Human Resources data to FM data by extracting information for the HR database and write back to the HR database. Updates on the central HR database must prompt updates to the FM system.
1.22	The system must be able to create an organogram of at least 3 tiers from the HR database and allow for the allocation of spaces to these portfolios, departments, and directorates.
1.23	The system must be able to provide industry-accepted methods for measuring employee space usage, including the Average Area per Occupant report.
1.24	The system must be able to track an employee's primary and satellite location.
1.25	The system must be able to track employee room changes and vacancy rates over time, generate Occupancy Plans, and Highlight Occupiable Vacant Rooms.

FLEET MANAGEMENT	
2.1	All Unisa staff members must be able to access the system online as requestors
2.2.	The system must be able to integrate with the HR Oracle system in order to access relevant personnel data.
2.3	An application for booking must first be approved by the requestor's manager (workflow) before the vehicle officer (administrator) can issue the car.
2.4.	When a booking is being made the system must automatically request and record driver license details. Provision must be made for attaching a copy of the requestor's driver's license.
2.5.	Traffic fines must be flagged on the database against the driver of the vehicle.
2.6.	The system administrator must be able to flag accidents against the driver involved and the description of the accident must be recorded on the system.
2.7.	Requestors must be able to search for a specific vehicle by type (e.g., 14-seater or sedan) and the date and length of time the vehicle is required.
2.8	The system must be able to search by location, E-tag, body type for cars that are available per date.
2.9	The system must keep track of vehicle status which must include availability and 'due for service'.
2.10.	The system must send a notification for a vehicle that has passed its booking period to the vehicle officer (system administrator).
2.11.	Only vehicle officers (system administrators) should be able to change status of booking.
2.12.	Requestors must be able to cancel a booking.

2.13.	Requestors must be able to change a booking.
2.14.	The system must generate a confirmation e-mail notifying the requestor of the status of the request
2.15.	The system must be able to record and alert that there have been regular checks to ensure that vehicles are operational and safe. Staff to perform checks based on pre-defined checklist. The vehicle attendant who performed an inspection must be logged against that particular vehicle.
2.16.	If there are no fleet vehicles available, then the requestor must have an option to either book a vehicle through the travel agent or use their own vehicle.
2.17.	The system must provide incident and damage reports.
2.18.	The system must flag the expiry date of annual license and automatically report to vehicle administrator.
2.19.	The system must provide reports to be used for cost recovery from each department (RC) for the car usage monthly.
2.20.	The system must be able to provide reminders for the regular servicing of vehicles based on vehicles' specific servicing requirements.
2.21	System must make provision for recording logbook data
2.22	The system must provide means to remind the user of the booking made per email one day before.
2.23.	<p>The system must be able to generate the following reports:</p> <ul style="list-style-type: none"> • Usage per department/ per user • Kilometre usage per year • Petrol usage per vehicle • Tollgates fees paid. • Reports indicating vehicle usage. • Accidents Reports • Reports on the cars which were booked but not used.

2.24	Fleet chargeback for fuel and repairs to be implemented in accordance with UNISA's Banking partner / service provider. Banking service provider is usually renewed/changed every +-5 years.
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PARKING ALLOCATION	
3.1.	Unisa staff members must be able to submit applications via the system. All staff members must be able to access the system online as requestors.
3.2.	Available parking must be displayed for selection on the web form. It must be possible to indicate 3 choices between the available parking areas.
3.3.	Allocations must be done in ascending numerical order. If for example carport parking is selected, only available parkings of type "Carport" in the indicated area of choice must be displayed.
3.4.	If all fields are completed the application data must be stored and a confirmation letter of a successful application must be generated by the system for display with an option to print or download as well.
3.5.	The system must integrate with the HR system to validate allocations in terms of post level.
3.6.	The system must allocate parking in accordance with a calculated ranking (points) and the indicated preferred parking area (e.g. P1, East or P1 West), starting with the first choice.
3.7.	If none of the preferred parking bays are available and employee indicated that another parking bay can be allocated, any other available parking can be allocated.
3.8.	After parking bays have been temporary allocated, an email must be sent to applicants requesting them to accept the parking bay. Applicant must indicate that they have accepted the allocated parking before the request is finalized.

3.9.	Staff members must be able to submit a request to change an allocated parking bay to a more suitable parking. This application must be stored on the waiting list and be allocated in accordance with the same rules as explained above with the exception that staff members with no allocated parking will have preference above those who want to change to a new parking bay.
3.10.	The system must integrate with the HR Oracle and Finance (Payroll).
3.11.	Staff must be able to cancel a parking site through the system and the payroll system and available parking database to be updated upon this action.
3.12.	The system must allow for certain types of parking to be handled differently, e.g. If staff on post levels 1, 2 or 3 resigns, payroll must be updated, but the parking bay must not become available for reallocation.
3.13.	The system must verify from the HR system whether a staff member is liable to apply for parking.
3.14.	The system must Integrate with the Finance system for the deduction of parking fees.
3.15.	It must be possible for the system administrator to reserve parking not to be allocated to any individual.
3.16.	Parking areas and bays must be linked to a campus. The system must accommodate more than one campus with parking areas and bays, e.g. Sunnyside or Florida. A parking must carry a flag to differentiate as follows: Reserved for Disabled Persons Reserved for Professors working from Home. Reserved for post level 1-3 Allocated Available
3.17.	The system must create parking discs.

3.18.	A parking bay must also be defined in terms of a parking type, i.e. Undercover parking, Carport parking, Shade net parking and the system must make provision for the different fees depending on the type.
3.19.	A bay must also be defined in terms of the section of the area e.g. P1 – East/West/ /North/South.
3.20.	The system administrator must be able to compile all letter layouts and informative messages on the system.

VENUE BOOKING SYSTEM

c) Introduction

University Estates needs an online venue scheduling and booking system to enable staff to book venues for Learner Support, meetings, and other activities.

d) Assumption

All Internal users (i.e., academics, administrators, regional office personnel, etc.) logging onto the venue booking system must be allowed (through access) to make use of the venue booking system. All external users must be able to book venues through an administrator. The system must be available to multiple users and have different access/security levels.

VENUE BOOKING (RESERVATIONS)	
4.1.	Unisa staff members (requestors) and the reservation officers (administrators) must be allowed to make or add bookings online.
4.2.	Requestors must be allowed to submit changes to their own bookings only, in line with terms and conditions of the reservation office.
4.3.	Requestors and administrators must be able to do multiple bookings.
4.4.	Multiple bookings on the same date, but not the same time, for a single venue, may be allowed.
4.5.	All bookings made by requestors are provisional bookings, until the bookings have been confirmed by an administrator (Add indicator to booking to see if it was confirmed).

4.6.	When a requestor adds a booking, an email must go out to administrator for booking to be confirmed.
4.7.	Bookings may not be updated by a requestor once it was confirmed by an administrator.
4.8.	Only the administrators should be allowed to change / update bookings once they are confirmed.
4.9.	All bookings can only be made when a venue is available.
4.10.	No double bookings should be allowed on the system.
4.11.	Only when schedule has been confirmed and administrator selects the e-mail option, should the email be sent out.
4.12.	All confirmation emails should be sent out immediately, followed by reminder a week before venue is to be used.
4.13.	Booking confirmations must be automatically e-mailed to requestors and administrators. (Must be over-ridden when needed).
4.14.	The following must be included in the confirmation e-mail to the requestor booking the venue: <ul style="list-style-type: none"> • contact number and email address of the requestor who booked the venue as well as the responsible person of the additional venue(s) • date of booking, time of booking. • Reference number • Capacity of the venue • Other details, such as campus, building name, office number, equipment etc.
4.15.	An email link must be available on the website, to inform the administrators about any changes or resource needs
4.16.	By default, provisional bookings should be held for 10 days, public holidays and weekends should be included in the provisional holding of bookings.
4.17.	The administrator must be able to over-ride access to the booking system.
4.18.	Registration for the service will be a prerequisite for external users. However, access to the system must be in line with the single sign- on policy of UNISA.
4.19.	The system must allow users to book future dates and return an error message if past date is selected on the calendar.

4.20.	The system must make provision to book a venue for specified time range. This means that the system needs to recognize cycles that are opened and closed by the administrator in order to facilitate timely bookings.
4.21.	Only meetings with a date of the current date or later can be amended.
4.22.	All bookings will have a provisional status until accepted by an administrator. A provisional booking will be removed from file either when the provisional hold period expires, or when the booking date and time has passed.
4.23.	The booking requestor / administrator should be authorized to amend or delete all bookings on file (normally, only a user's own bookings can be amended).
4.24.	All bookings must have the option for a 30min period between bookings. (This is to allow for setup for the venue and equipment, etc.).
4.25.	All available venue types, including venue details must be listed to the user. The system must return venues that match the user's selection.
4.26.	When making a booking, the requestor should be allowed to add a note to the administrator indicating resources required.
4.27.	The start date should be entered by selecting from a calendar. The system should select / indicate the next available time in the event of the requested time being unavailable.
4.28.	If an amendment is being processed, then the original times must be selected automatically.
4.29.	The system should allow the user to view which venues are available for the date requested, including venue details such as size, equipment etc.
4.30.	The system must be able to issue a sequential booking number as confirmation.
4.31.	The system must be linked to the Finance system, to enable financial monthly reporting. All activities to link to the financial system. Must be able to check the history of active venues and its financial participation per venue. A penalty fee must be issued for late cancellation. A full priced is charged for an unused booking.
.	The system must have a drop-down menu, which classifies room according purpose. Example of groups are: Satellite broadcasting facilities Tutorial room Boardroom (meeting room) Discussion rooms DVD (Video) room

4.33.	<p>Requestors must be able to check the availability of venues.</p> <p>The screen display must differentiate between</p> <ul style="list-style-type: none"> • Bookings which have not already started • are due to start within the next 15 minutes. • which have started up to 5 minutes earlier • all others.
4.34.	<p>Venue Availability Report A graphic display of venue availability to be shown for a specific date range selected: Free times booked times. The graph can have the date moved forwards or back, but not earlier than the current date. User booking, Dates of booking, Duration of bookings, Regions booked, How many days of bookings per month per venue How many hours booking per month per venue. Total utilization / booking per venue per month (reason for booking venue)</p> <p>Administrator Report The system should report all bookings with caretaker action required. This can be room set-up, a seating plan or a resources requirement.</p> <p>The display should be over a variety of date options, and the results may be displayed in either date, or venue, sequence. Once displayed, the report should be printable / printed.</p> <p>The system must disseminate booking information for different campuses and building to security personnel.</p> <p>A report to display how many venues booked but not used per user.</p> <p>Management reports such as – Income report per venue, or per RC must be possible.</p>
4.35	<p>Additional requirements:</p> <ul style="list-style-type: none"> • Integration with Outlook • Full workflow functionality in order to track and trace processes and to allow users and administrators to determine where in the process the booking are. • Search functionality

	<ul style="list-style-type: none"> • Integrate with HR Oracle & Finance Oracle • Full integration with the Space Management system • Full integration with the Assets system to retrieve assets belonging to venues. • Integrate with single sign on (Portal) and other systems maintained by ICT.
4.36.	<p>Resources Report This system should report all bookings with its required Resources. The display should be over a variety of date options, and the results may be displayed in either date, or venue, sequence. Once displayed, the report may be printed.</p>
4.37.	Only Administrators and RC Management are allowed to generate reports.
4.38	Not all the venues are bookable.
4.39	If the booking request is not attended within 5 days, it must escalate to the next administrator.
4.40	Function sheets per day, per week, per month or yearly must be able to be viewed and be able to be distributed to the relevant personnel.

BUILDING MAINTENANCE	
C. Service Desk	
5.1.	All staff members must be able to access the system online as requestors.
5.2.	On access, notes (to be provided) must display to provide staff with relevant information.
5.3.	<p>Examples of notes to be displayed:</p> <p>Emergency phone number: <u>Only</u> for power failures and water leaks: 012 429 3050 for Pretoria Campuses and 011 471 3241 for Florida Campus. For telephones log a request on ICT Self Service. For any computer related problems log a request on ICT Self Service. For keys, email keys@unisa.ac.za for Pretoria and for Florida Campus email Facilitycare@unisa.ac.za . For lifts, phone 012 429 3276 or 012 429 3299 during office hours or Security at 012 429 6262 after hours. For Florida Campus call 011 471 2249 or 083 631 5655 for after hours. For the removal of redundant or unused furniture phone the furniture store at 012 429 2740. 011 471 3241 for Florida Campus.</p>

5.4.	On clicking on a 'Continue' button the service request form must open.
5.5.	Create Service Requests.
5.6.	The service desk application must integrate with the HR Oracle system to populate the personal and contact detail fields of the requestor.
5.7.	On entering a valid staff number the following details of the requestor must display: Name; Phone number; Email address; Building; Department; Floor and Room/office number.
5.8.	All data fields are compulsory (details of requestor)
5.9.	The requestor may change information in the data fields (details of requestor)
5.10.	An alternate contact detail field must be a compulsory entry field. A name and phone number must be entered.
5.11	The responsibility centre (RC) code of the requestor's department must be a compulsory entry field.
5.12	The requestor must select campus (site) and building from menu. (This should include all buildings and campuses nationally)
5.13.	The requestor must select a service group.
5.14.	The requestor must select a service from the selected service group.
5.15.	The requestor must enter a description of the repair or service required in a free text box.
5.16	The requestor can select more than one service from one service group,
5.17.	The service requests are routed to a supervisor per service group and per campus.
5.18	The requestor must be able to book a service for a specific day.
5.19	There must be a field for clients to indicate the suitable time for maintenance staff to come and attend to the request.
5.20	Service level agreements (reaction times) and priorities are allocated to each service.
5.21	The supervisors assign the service requests to a worker or group of workers to complete.
5.22.	The supervisors update the progress status of the service requests.
5.23	The supervisor or helpdesk administrator closes a resolved service request.

5.24.	Service requests that are not resolved within the service level agreement timeframes are escalated to the appropriate supervisor / manager / director.
5.25	A document attachment function must be available for users to attach any relevant documentation to the service request.
5.26	All service requests must receive a reference number (job number).
5.27	On submitting the service request the user must receive an email with the service request reference number and an estimated completion time / date.
5.28	The Service Desk administrator can reject a service request if more information is needed, or UE is not the service provider for the requested service. This should allow for the service request to be redirected to the relevant work team by an administrator.
5.29	More information can be obtained via phone or email and the text field can be updated by the Service Desk administrator.
5.30	The system must allow the Service Desk Administrator or user to continuously provide the requestor with feedback on the reported job.
5.31	A tick list must be provided with standard feedback responses, e.g.: Spare parts on order – waiting time [1] / [2] / [3] weeks. New items on order – waiting time 2 weeks. Contractor on site Order submitted to external contractor – waiting time 2 weeks. Responded to call, staff/office not accessible. In progress Free text field
5.32	The Service Desk system must have a feedback questionnaire to allow clients (the requestors) to give feedback immediately after the job has been resolved. (optional)
5.33	The Service Desk administrator should be able to view a report detailing regular jobs performed e.g., Electrical, Plumbing, painting etc., which building is regularly giving problems and offices that have been attended to, turnaround time, clients feedback report and the man hour spend per job, names of staff members allocated and completed a particular job per month.
5.34	5. Daily Reports 5.1 New requests logged – sort/filter by service type, service, technician. 5.2 Open requests - sort/filter by service type, service, technician

	<p>5.3 Closed requests - sort/filter by service type, service, technician.</p> <p>5.4 Age Analysis of requests - sort/filter by service type, service, technician.</p>
5.35	<p>6. Weekly/Monthly Reports</p> <p>6.1 Total number of requests logged - sort/filter by service type, service, technician.</p> <p>6.2 Total number of open requests - sort/filter by service type, service, technician</p> <p>6.3 Total number of closed requests - sort/filter by service type, service, technician</p> <p>6.4 Average response time per request - sort/filter by service type, service, technician</p>
5.36	<p>7. Yearly Reports</p> <p>Activity Based Costing driver data:</p> <p>3.1 Service requests per Responsibility Centre (RC)</p>
5.37	<p>8. Exception reports</p> <p>8.1 Standard response time exceeded – list per service, service type, technician.</p> <p>8.2 List of 'Other' requests.</p>
5.38	The Service desk system should provide an easy-to-use, graphical interface for planning and scheduling on demand work.
5.39	If a request requires approval from a line manager (based on the SLA) a workflow rule should be used to escalate the request.
5.40	Requestors must be able to track the response to their requests in a personalized interface. Each status change must be communicated via an email by the system.
<p>BUILDING MAINTENANCE</p> <p>D. Equipment Register and Preventive Maintenance</p>	

5.41	<p>The system must provide for an equipment register with the following fields:</p> <ul style="list-style-type: none"> Campus/Site Building name Building number Main equipment number Description Capacity/size Location/ Room number Make Model Serial number Date of installation Operational status Expiry date of warranty Lifespan of equipment
5.42	The system must allow the addition of sub-equipment numbers linked to the main equipment number.
5.43	The system must allow an employee number as well as the work-order/job number to be linked to an equipment number for every work performed on that particular equipment.
5.44	The system must also allow for the creation of unique contractor numbers to be also linked to every work order created for a contractor or a project number.
5.45	The system must create work orders/job numbers based on a request submitted and allow for proper classification of maintenance discipline for ease of job allocation to correct resource.
5.46	The system must generate planned maintenance schedules based on determined maintenance strategy for various equipment's immediately when equipment is activated on the system.
5.47	The system must keep history of every activity that is done on the equipment including sub-equipment numbers for the longest period possible or software allows.

5.48	The system must be able to store the (Original Equipment Manufacturer) OEM Manual/s or important information extracted from the manual/s as classified important by the user.
5.49	The system must also keep and store maintenance plan information which must be easily interfaced with equipment registration and activation onto the system.
5.50	The system must keep and store preventive maintenance (PM) work procedures which will be easily accessible to technicians and other users, and which can be attached to a job-card/work order for a certain PM to be executed.
5.51	The system must be able to calculate the total cost of maintenance on an equipment per request taking into consideration the hourly rate of the resource executing maintenance as well as the actual cost of travelling and material used in order to allow for cost analysis per equipment maintained which will aid the decision making when replacement of equipment is done.
5.52	The system must allow the user to draw up history reports based on a particular type (e.g. PM's, failure or breakdowns etc.) in either a graphic format or table format and also provide the user with the mean time between failures
5.53	Based on the information provided a reminder must alert the custodian of the equipment that is nearing its end of life. This information must be made available as a spreadsheet report for planning and budgeting purposes.
5.54	The Preventive Maintenance (PM) application must be able to provide an intuitive interface for creating and modifying PM procedures, detailed steps for those procedures, and resources for each step.
5.55	The user must be able to assign defined procedures to specific equipment or locations.
5.56	Users must be able to generate work orders for preventive maintenance (PM) work requests according to a set of rules.
5.57	Users must be able to create schedule rules for all equipment – procedure or location – procedure combinations. The system must use the schedule rules to create PM work orders that contain all the information needed to perform the maintenance work, at the time that the work is needed, with the correct resources to get the job done.
5.58	Users must be able to define the date range for work orders to be generated, filter the set of work orders to only the criteria needed, and group work requests into work orders based on parameters, such as site, equipment standard, or a pre-defined grouping code. In addition, users must be able to define rules to automatically generate work orders for specific recurring intervals.
5.59	Users must be able to assign pre-defined SLAs to preventive maintenance requests. The SLAs must automatically route the work to the relevant person/section, enforce rules for response times and generate work requests.

5.60	Users must be able to update actual costs or hours a worked before closing out work orders.

PORTFOLIO REQUIREMENTS	
1	<p>Web-based Portfolio Management helps streamline data collection and analysis by accurately aggregating individual portfolio items to create a consolidated portfolio view. The application tracks current and projected holdings, leased versus owned space, building.</p> <p>cost performance data, and more, to enable insightful planning and execution. Drill-down capabilities, graphical and geographic dashboards, KPI charting, and personalized views also help users visualize and analyse data to make fact-based decisions on the portfolio's ability to fulfil the organizational mission.</p>

LEASE ADMINISTRATION REQUIREMENTS	
1	<p>Web-based Lease Administration provides a centralized repository, flexible dashboards, automated alerts, and more.</p> <p>Deploying the application will help streamline data entry, automate lease information-gathering and management, and improve analytic capabilities, all while providing a high service level at reduced cost.</p>

SMART CLIENT EXTENSION for AutoCAD and Revit REQUIREMENTS	
1	It connects AutoCAD/Revit to a database and allows for bi-directional transfer of data along with a 2D/3D representation of space.

HEMIS REQUIREMENTS	
1	HEMIS application takes the every-day space data and turns it into HEMIS reports as required by the DHET annually. It aims to reduce the time spent collating these reports to days instead of months.

MOBILE FRAMEWORK REQUIREMENTS	
1	Mobile Framework delivers a new breed of secure, easily configurable, and customer-responsive apps, providing accurate facilities information when and where it is needed. Creates mobile apps once which will run on a variety of late model, high-end mobile devices. And new technology makes your data—including photos, campus plans, and floor plans—interactive, so that any authorized user can quickly locate spaces, people, assets, and tasks.

ASSET PORTAL REQUIREMENTS	
1	Asset Portal is the application for managing assets and was designed to provide a Web-based method of developing asset data, as well as a Web-based portal into asset data that you developed in a Client/Server. It includes tasks that focus on establishing fundamental data about your office, telecom, and facility equipment, and furniture-- where the furniture or equipment is located, the division, department and employee using it, its identifying code, the item's classification or standard, and its condition. If you enter cost information for your equipment and tagged furniture, such as the purchase price, salvage value, install date (for equipment) and delivery date (for furniture), you can calculate depreciation. The features of Asset Portal are available in Asset Management and Enterprise Asset Management.

FURNITURE REQUEST REQUIREMENTS	
Role	Requirement description
Business Unit/Department /College	<ul style="list-style-type: none"> Once the requestor selects the building name/number the remaining fields should automatically populated by the system. User must be able to drop down and select the item. The requestor can request for more than one staff member if is not for medical reasons, and the requests must be for the same building and RC code.

	<ul style="list-style-type: none"> • All the fields must be pre-populated and must be drop downs if field has multiple items. • The motivation field must be typed by the user. • Refer Page 1 in the Addendum for the required fields, application for nonmedical reasons. • All System the fields must be completed, if incorrectly filled, the system must warn the user with correct message. • Additional rules for medical request, • One staff member per application, if is for medical reason. • Motivation field is compulsory if is for medical reasons. • A proof of medical certificate document must be attached. • Refer to 1.8 in addendum on form 2 for medical fields. • No inspection for medical condition.
Facilities Management System	<ul style="list-style-type: none"> • Once the user submits the application, the System Furniture request generate the furniture request number/ service request for the application and email it to the requestor.
University Estate (Property Management)	<ul style="list-style-type: none"> • Print each request for inspection purposes. • Update the requested items on the system after inspection. They will tick yes/no field and write comments next to the ticks.
Facilities Management System	<ul style="list-style-type: none"> • System to generate report based on recommendations and send it for approval according to values in line with the delegation of authority
University Estate (Property Management)	<ul style="list-style-type: none"> • System to generate report based on recommendations and send it for approval according to values in line with the delegation of authority. • Send communication to the requestor containing the items which are approved and those that are not approved for purchasing. • approved for purchasing.
University Estate (Property Management, Deputy Director, Director, ED, and VP)	<ul style="list-style-type: none"> • The University Estate follow the HR signing powers for approving the requested furniture. • R1-100000 approve by <ul style="list-style-type: none"> ○ the director. • R101000-R500000 approved by the\ <ul style="list-style-type: none"> ○ Executive director. • R501000 and more signed by vice principal.

Property Management	<ul style="list-style-type: none"> Property Manager sends the RFQ to SCM
SCM department	<ul style="list-style-type: none"> Finalise purchase order
University Estate (Property Management)	<ul style="list-style-type: none"> Send emails 5 days before delivery to asset management and staff members that will receive furniture. System to generate furniture delivery schedule per PO. Property Manager to complete asset numbers on delivery schedule
Staff Member (Receiving the furniture)	<ul style="list-style-type: none"> Receive the furniture and sign for the delivery
Assets Management	<ul style="list-style-type: none"> Receive the signed delivery schedule and update the Asset management System. This process is not necessarily in the Facilities Management System.

WORKFLOW	
To ensure all task related to all modules of the system are managed using proper approval processes. This is critical when tasks are created and reused by multiple parties. To ensure processes are transparent, auditable, efficient, and automated.	
1	Users need to be able to route tasks or processes along predefined routes for review or approval.
2	Users need a functionality to allow for the assignment and tracking of tasks via a particular hierarchy by setting timelines for completion of such tasks.
3	Users need to be notified via email when documents/ requests are being routed from one participant to another for approval.
4	The solution needs to integrate with HR Oracle, HR Finance and spatial data.
5	Customisable workflow functionality is needed for document/ request approvals, e.g. assigning workflow to groups.
6	Task allocation must display date stamping.

7	Workflow functionality in order to track and trace processes.
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PORTAL REQUIREMENTS	
1	The system must provide Unisa staff with a single point of access to the modules of the Facilities Management system.

NON-FUNCTIONAL REQUIREMENTS	
1	The system should be scalable to accommodate increasing workloads, additional facilities, and growing data volumes. It should be able to handle future expansion without significant impact on performance.
2	The system should enforce strict access controls, encryption, and data protection measures to safeguard sensitive information such as equipment inventory, maintenance records, and customer details. It should comply with relevant security standards and regulations.
3	The system should support seamless integration with other systems such as financial management, HR, and procurement systems. This allows for data sharing, automated workflows, and streamlined processes.
4	The system should have robust reporting and analytics capabilities, allowing users to generate customizable reports, track key performance indicators (KPIs), and gain insights into facilities management operations for informed decision-making.
5	The system should be able to handle a large number of concurrent users, process requests efficiently, and provide quick response times for various operations such as asset tracking, work order management, and reporting.

SYSTEM INTERFACES	
1	ORACLE
2	SAP

3	Sage
4	CAD, it provides Facilities Management System with design software
5	Building Information Modelling
6	The system must integrate the usage cost with Oracle GL

ADDITIONAL REQUIREMENTS
An integrated, web-enabled system comprising all modules.
Integration with Microsoft Outlook and Office 365
Search functionality
Workflow functionality
Integrate with HR Oracle & Finance Oracle
Integrate with Microsoft Active Directory
Integrate with single sign-on (Portal) and other systems maintained by ICT.
Data migration of legacy systems

14. ANNEXURES

- **Annexure A7: Pricing template**
- **Annexure A8: Reference template**
- **Annexure A9: Technical Response Template**
- **Additional Annexure: Software and License Agreement:** The tenderers hereby agree and acknowledge that upon award of the tender to them, the terms and conditions, attached hereto as Annexure A8 shall regulate the relationship between the parties without any modification.