TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT ADOBE ACROBAT SIGN, TRAINING, MAINTENANCE AND SUPPORT FOR 12 MONTHS

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1. INTRODUCTION

1.1 The Quality Council for Trades and Occupations (QCTO) is a Quality Council established in 2010 in terms of the Skills Development Act Nr. 97 of 1998. Its role is to oversee the design, implementation, assessment and certification of occupational qualifications, including trades, on the Occupational Qualifications Sub-Framework (OQSF). The QCTO also offers guidance to skills development providers who must be accredited by the QCTO to offer occupational qualifications.

Visit: https://www.qcto.org.za for more information.

2. BACKGROUND

2.1 The QCTO has implemented the Microsoft SharePoint technology system to facilitate document and record collaboration and further allow workflow introduction. There is a need to improve and secure electronic document processes by introducing the concept of signing documents digitally.

2.2 The QCTO has one branch at 256 Glyn Street, Hatfield, Pretoria, with an estimated +- 150 end users.

3. SCOPE OF WORK AND DELIVERABLES

3.1 The QCTO requires an enterprise digital signature solution covering the entire QCTO technology landscape - Adobe Acrobat Sign for Microsoft PowerApps and Automate.

3.2 The service provider is required to supply and implement a digital signature solution that will support the following:

a) Enable users to sign documents digitally.
b) Documents can be digitally signed as part of a workflow in Microsoft SharePoint Online or as a standalone document on their laptops.
c) The software should have a button in MS Office 2016 or the latest ribbon to add digital signatures.
d) Supported document formats must include Word, Excel and PDF at a minimum, and users must be able to request signatures from internal and external signers.
e) The solution should provide functionality to sign documents digitally and easily send documents for digital signature. This includes the ability to provide real-time visibility into the status of a document.
f) It should provide the ability for real-time visibility of the status of the document sign-off request. This will enable the user requesting sign-off to know when the document is opened, signed; or returned.
g) It should provide functionality to add the names, SharePoint groups and email addresses (for the standalone option) of the individuals (recipients) who need to sign the document and provide an option to specify the order of signing and re-assignment option.
h) Users must be able to combine multiple documentation types in one request to various signers.

i) The solution should provide sufficient security and advanced authentication methods (e.g. 2-factor authentication) to validate the signatory's identity, and the data should be securely encrypted.

j) An audit trail of the document workflow information should be retained to prove compliance from initiation to completion.

k) A workflow process which will record an audit trail, including the status of a user's document. That indicates when the document was uploaded and sent, to whom it was sent, and when it was opened, signed, and returned.

l) The resulting digital signatures should be legally enforceable (digital signature evidence should be admissible in a court of law).

m) The solution should also work on mobile devices e.g. smartphones (Android and iOS) and tablets. This will enable users to review and sign documents using mobile devices.

n) The digital signature created must be verified by a solution provider that is a Certification Authority (CA).

4. INTEGRATION REQUIREMENTS

4.1 The solution should be able to integrate with MS SharePoint Online workflow. It should be able to email the document link (one document to multiple recipients) to the individuals (recipients) who need to sign. Once the document is complete and signed, it should be stored securely for easy retrieval.

5. MAINTENANCE AND SUPPORT

5.1 The service provider must implement the above solution and provide maintenance and support for a period of 12 months.

5.2 The support will cover upgrades, patches and updates of the software.

5.3 Upon completing implementation, the service provider must train the QCTO staff on the usage of the digital signature solution.

7. PROJECT TIMELINE

7.1 Deployment should be within 21 days of the award of the Purchase Order.