

TERMS OF REFERENCE FOR A MICROSOFT DYNAMICS ERP CONSULTANT TO FINALIZE THE TECHNICAL AND FUNCTIONAL REQUIREMENTS IN CONJUNCTION WITH THE EXISTING DEVELOPERS

Organisation:	Action Africa Help International(AHHI)
Type of Contract:	Short Term consultancy
Duration of Consultancy:	3-6 months

1.0 Introduction

Action Africa Help International (AAH-I) is an African-led, Africa focused international non-governmental organization that works with communities in Africa, particularly women, children and youth, to sustainably improve their quality of life.

AAH-I works as a facilitator with the most marginalized communities in Africa (Kenya, Somalia, South Sudan, Uganda, Zambia, Djibouti, and Ethiopia), supporting their self-reliance efforts so that they can empower themselves to become resilient and ensure that no one is left behind.

AAH-I is implementing an ERP, Microsoft Dynamics Navision, for the management of various departmental processes and would like to engage a consultant with the technical knowledge of the system, as well as a good in-depth understanding of AAHI's processes with a great experience of ICT systems project management.

2.0 Deliverables and Objectives

1. Bridging the gap between the developers and AAHI by acting as a Consultant, and working very closely with AAHI's ICT department.
2. Audit and identify the gaps in the system based on the initial ERP TOR and User Specifications (UAT scripts)
3. Identify and resolve all burning/ recurrent issues in the system across all countries in all modules.
4. Review our (AAHI users') understanding and ability in using the system
5. Audit security features of the system, including permissions, attacks, logs, etc.

6. Check the capacity, risks, and limitations of the system and the system developer capacity to deliver and give a report to AAHI
7. Advise other functionality of the system at a full-scale level
8. Complete all other issues that have not been started or tested
9. Work and push the development team for the documentation: Manuals, codes, workflows, Database tables, etc., as outlined in the original ERP TOR
10. Set up a work plan with timelines that will strictly be followed
11. Use and manage online tools to monitor the tasks at hand; prioritize the tasks and demonstrate clear coordination of the tasks.
12. Integration of Business Intelligence tools for reporting purposes, and any other tools and components such as MnE and CRM.
13. Come up with a plan to handle the training of the users, and get involved in the training.

3.0 Scope of the Work

The consultant will work with the existing developers and the AAHI ICT team to finalize the customizations of the Microsoft Dynamics Navision system to meet the requirements of AAH-I. The scope of the customizations is outlined in “**AAH-I Microsoft Dynamics 365 Customization Requirements**” document. This document is an integral part of this TOR. The consultant is expected to bear in mind that user's requirements may be redefined by the users in question during the user acceptance test of the system. This should be effected if they do not fall out of the already accepted scope. The consultant will test and help finalize what has not been done from the overall expected system features as below:

- i. **Single Sign-In:** The system should provide a single sign in Intranet interface by which the user accesses all the underlying applications
- ii. **Workflow:** The system should have workflows for various business processes. These workflows should be formulated using the existing procedures and benchmarking on the recommended workflow standards.
- iii. **Dashboards:** The system should be able to generate dashboards to various users of the system. This should be formulated based on different information requirement for different users of the system.
- iv. **Web Access:** The system should be accessible via internet on a web browser.
- v. **Reports:** The system should be configured so that it is able to generate different reports to different system users as per their needs so as to support day to day management and running of the organization.

- vi. **Controls:** Controls should be in-built within the system where, marker-check is implemented and access to information on the system should also be restricted per the user access levels and rights.
- vii. **Single Database:** The system should run from a single central database that is secure.
- viii. **User Access Levels/Roles/Rights:** The system should have a user administration center which manages user roles, users access levels and the right they have over the information on the system i.e. what they have access and what they do not have right to access.
- ix. **Multi-Currency:** The system should be able to work with different currencies used in Kenya, Uganda, South Sudan, Somalia, Zambia, Tanzania, Rwanda, Burundi, Ethiopia, Djibouti as well be able to generate reports in other donor reporting currencies which includes USD, GBP among others.
- x. **Document Management:** The system should have an underlying document management system to allow users to upload crucial documents as attachments to various system entries. This helps in archiving crucial documents.
- xi. **Data Security:** The system should be well secured from unauthorized access and data in the system well secured.
- xii. **Email Notifications:** The system should be configurable to send out email alert notifications.
- xiii. **Audit Trail:** The system should have an audit trail for all the events in the system.

4.0 Consultant profile requirements

1. ICT system Project management experience- must be proven with referrals
2. Technical qualifications: Microsoft Dynamics system proficient. Requirements: BSc/ MSc Computer Science or a related degree, SQL, report Design and Formatting, and/or Microsoft Dynamics Certification.
3. Finance qualifications: COA, Reports- Standard reports: Statement of Financial Position, Statement of Comprehensive Income, Statement of Cash Flow Statement, Change in Equity, Fixed assets movement schedule. Preferred requirement: CPA/ACCA
4. A minimum of 3 organizations worked for with proof indicating the sectors (attach contracts first page and the signature page)
5. Proof of Tax Compliance

6. 5.0 Timelines

This assignment will take place within 3-6 months from the contract signing date unless changes are made that will appear in the contract.

6.0 Application procedure

The interested candidates are requested to submit:

- a) Technical proposal document which should contain the **requirements** indicated above as well as the following:
 - (i) Demonstrate clear understanding of the scope of work and how the consultant intends to meet the deliverables with timelines.
 - (ii) Demonstrate technical know-how on Microsoft dynamic implementation by sharing at least 3 copies of previous contracts that he/she implemented successfully as well as their recommendations.
 - (iii) Demonstrate technical capacity by sharing CV/Cvs of the technical expert to be involved in this consultancy

- b) Financial proposal with detailed budget clearly broken down and should be in USD.

The proposal should be submitted to:

AAHI HQ (procurementhq@actionafricahelp.org) on or before 30th of June 2023

7.0 Evaluation and award of the consultancy

Eligible proposals will be evaluated based on full and open competition, in strict adherence to the scoring criteria detailed below:

Criteria	Score
Interpretation of scope of work	20 points
Suitability of the consultant profile requirements	30 points
Experience in Similar Assignments	30 points
Financial proposal	20 points

AAHI Management reserves the right to accept or reject any proposal received without giving reasons and is not bound to accept the lowest or the highest bidder.

8.0 Payment schedule

The payment schedule is subject to negotiation with the consultant based on proposal submitted as well as AAH-I policy, and to be detailed in the contract to be signed with the consultant

9.0 Special provisions

Changes in the scope of work shall require prior discussion and approval by AAH-I and shall be defined in writing.

