

E-Recruitment system & solution Request for Proposal

MB Ageas Life, a start-up Insurance company, seeks proposals from vendors with proven experience to implement E-invoice system & solution

1. MB Ageas Life

- We started our journey in August 2015 when Ageas and Muang Thai Life Assurance signed an agreement with MB group to establish a joint venture in Vietnam. MB Ageas Life (MBAL) was born.
- From the 18th position in the market in 2016, with effective efforts and business strategies, MB Ageas Life has made a breakthrough in the insurance market: Top 6 market-leading Bancassurance company in 2019.
- We now aim to maintain our top 5 in Bancassurance and expand our agency channel.
- Our website: <https://www.mbageas.life>
- Contact:
 - Cát Thành Dũng – Business PM: 0906 898 566
 - TBD - ITPM

2. Project Goals

We seek to implement E-Recruitment system and solution to accomplish the following key goals:

Background	<p>Our current situation:</p> <ul style="list-style-type: none">• Agent recruitment process is now based on manual data entry of records & spreadsheet reports• Processes are time-consuming, repetitive & prone to human errors• Major players have already implemented their E-Recruitment system in recent years, MBAL need to build a highly-sculpted electronic recruitment system
Main purpose	<ul style="list-style-type: none">• To decrease the recruitment lead time• To attract and empower an increasing number of applicants to apply in the MBAL <p>Help Agents to change their behavior towards a more professional and digital sales experience to improve their productivity</p>

<ul style="list-style-type: none"> • Solution and features 	<ul style="list-style-type: none"> • To decrease the recruitment lead time • To attract and empower an increasing number of applicants to apply in the MBAL • Help Agents to change their behavior towards a more professional and digital sales experience to improve their productivity • Increase approaching to Agents & good experience on multi-platform (smart phone, tablet, Window/Mac OS) • System can flexible in extent of infrastructure to adapt to business extension • More automation more advantage • Manage records / documents of recruitment activities scientifically and automatically • Tracking documents amendment version on each step of process • Enterprise content management was organized logically for fastest inquiry/sharing/download • Autofill the registration form by collecting information from available database and scanning the ID, document with popular format • System will check validation rule when user leaves focus on each fields of the form • Manage / track the status of each step of Recruitment Process • Process workflow is transparent, easy for overview & flexible; Allow Admin user to set up/change workflow and procedure • System auto send notification (Email/SMS/ Web socket include link) to stakeholders if the authorities approve at each key steps • Develop a recruitment data system, for cross-checking and screening of information / status / issues of candidates. • Automatically extract reports related to recruitment activities, ensuring the accuracy of reports • Provide reports about system & tracking as authentication, audit trail, system log, apps log, SLA reports and recruitment reports as requirement • Integrate with current systems (SAP) and other implementing system (LMS, DMS/ICM, Mail, SMS, Authentication login etc.)
<p>Timeline</p>	<p>Development: Feb 2021 – Jun 2021</p> <ul style="list-style-type: none"> • Phase 1: Feb 2021 to Apr 2021: Core function of E-Recruitment (Presentation, Questionnaire, Candidate management, e-registration, Review) • Phase 2: Apr 2021 to June 2021 Recruitment reports and Integration with other system like LMS, ICM/DMS, Sales Portal...

Term:

No	Term	Description
1	Ability to response	- Full acceptance - Partial acceptance - Do not accept
2	AD	Area Director (Sales Manager)
3	AS	Agency Support Department
4	AR	Agency Recruitment Department

2.1 Business requirement

Code No	Requirement description	Priority	Ability to response	Note
e-Recruitment: General functions (web-based)				
BIZ.01	Separate interface, workflow, template for Banca & Agency	Must have		
BIZ.02	Allow to access the recruitment system anywhere via Internet (compatible with Web-based, Mobile, Tablet)	Must have		
BIZ.03	Dashboard to personal task managing & Statistic of tasks for user upon role (Ex: manager role can see statistic of tasks of his team)	Must have		
BIZ.04	Import agent structure information from SAP (from other systems / manually upload)	Must have		
BIZ.05	Allows to set up review/approval authorities for each level based on organization tree and agent structure definition	Must have		
BIZ.06	Presentation (Join us) - Allow to upload material (slide/video) for presentation to applicants <i>(Materials for presentation will be Introduced about Financial Consultant career (including 01-03 slide presentation and 01- 03 introduction videos of MBAL</i> - User can play presentation/video online or download the material.	Must have		
BIZ.07	Discovery - Questionnaire	Must have		
	Questionnaire will be added to the Discover section. Candidate will answer the questions in the template questionnaire. <i>(Questionnaire page will be put after the screen of introduction of purpose)</i>			
	The list of Questions and result can be customized by admin users - Upload excel file, or			

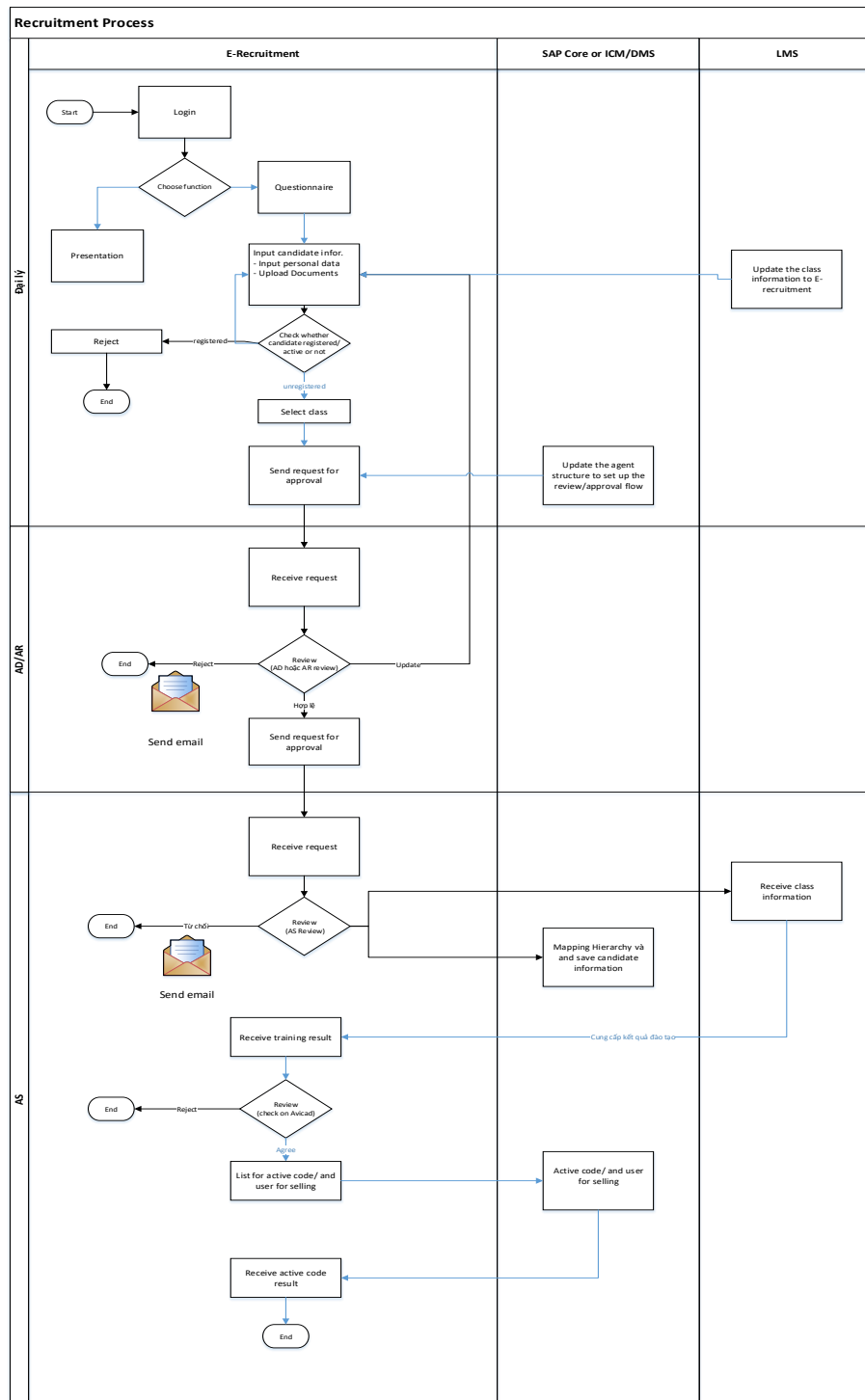
Code No	Requirement description	Priority	Ability to response	Note
	- Edit directly			
	Allow to store other data from importing excel file			
BIZ.08	Input candidate information manually/import from excel file (following MBAL's template) /integrated to company website to have candidate information	Must have		
BIZ.09	Have OCR - Scan ID Card (User upload ID Card to the system) to Extract information and auto fill the form	Should have		
BIZ.10	<p>The system will automatically save candidate in "Candidate management" if the candidate input all the fields: Full name, DOB, gender, ID number.</p> <p>Check duplicate for ID number, if having the same ID in the system (from data of other systems or its data) System will pop-up warning message "duplicate client" <VN: Ứng viên này đã hoạt động, vui lòng kiểm tra lại> with 2 buttons < Candidate management> & <Cancel>. User can go to Candidate management page or back to current page when click to corresponding buttons</p> <p>If candidate complete questionnaire:</p> <ul style="list-style-type: none"> • System will raise 3 messages corresponding to 3 results (Type A, Type B, Type C) • All information and result of questionnaire will be combined into registration form and generate pdf file after submitting e-Registration step. <p>Review to ensure candidate complete all the question; if not, remind the candidate</p> <p>Allow recruiter to create a link for candidate to connect and answer the Questionnaire</p>	Must have		
BIZ.11	<p>e-Registration</p> <p>Allow admin to design fields/form of e-registration</p> <p>Input candidate info by:</p> <ul style="list-style-type: none"> - Input manually - Auto extract information and auto fill the form <ul style="list-style-type: none"> • User can use candidate information from Candidate Management to auto fill the form • Collect available data from other database or its database to fill the form of e-registration - Scan ID Card (User upload ID Card to the system) to Extract information and auto fill the form <p>Fields are following validated rules. System will check validation rule when user leaves focus on that field. (E.g: Define format for data input such as selection list, email format, max. character....)</p>	Must have		

Code No	Requirement description	Priority	Ability to response	Note
	Check duplicate for ID number, if having the same ID in the system (from data of other systems or its data) - System will pop-up warning message "duplicate client" <VN: Ứng viên này đã hoạt động, vui lòng kiểm tra lại> - User cannot continue to input any info. User has to correct ID number to continue			
	Capture document and e-Signature - User need to complete capture document (color PDF, maximum total uploaded size 5MB) before process eSignature - Allow for sign directly into E-registration screen (<i>e-signature</i>)			
	Select class 1/ System allows to receive class information by: - Integrate with LMS to get class data - Upload class data manually by excel file 2/ System allows to: - Push information of class data to LMS (by excel file + API) - Extract class data 3/ User need to complete form and upload document before selecting class list. 4/ User have to select for candidate before submitting E-Form to back-end			
	Allow to extract pdf file of e-registration			
BIZ.12	Candidate Management	Must have		
	Allow to search candidate with criteria Name, DOB, ID number....			
	The result will be the list of candidates including Name, DOB (Date of Birth), ID number and the status of e-Registration: 1. <null status> User has filled personal info in the Discover section, not filling the registration form 2. Pending – User has not completed e-Registration forms. And they choose to “Save for Later” during the process. 3. Un-submitted – There are completed e-Registration forms. Since the device was in offline mode, the form is not submitted to MBAL server. 4. Submitted – These are completed forms and submitted to the MBAL servers. 5. Approved – AD have approved e-Registration forms 6. Rejected – AD have rejected e-Registration forms			

Code No	Requirement description	Priority	Ability to response	Note
	With candidate having status of <null status>, <pending status>, <unsubmitted>, system allows user to link it to e-Registration form to fulfill the Candidate information.			
	With candidate having status of <Submitted><Approved> <Rejected>, system allows user to view the Full e-Registration form			
	Submission & tracking: tracking the status of the application after approved			
BIZ.13	Review by authorities following by chart of organization (Sales Manager/ Agency Recruitment Department)	Must have		
BIZ.14	Email alert to AD if having submitted case	Must have		
	There are notifications about waiting-approval cases on the screen			
	There are the approval website that allows Authorities to view the information of candidate, the registration form of that candidate & can approve/ reject that registration form.			
	If authorities reject/approve: email to recruiter			
	System should have the search function allowing Authorities to search all the candidate, and change his/her decision from reject to approve			
BIZ.15	AS Review	Must have		
	There is the approval website that allows AS to view the information of candidate, the registration form of that candidate & can approve/ reject that registration			
	Automatic reject cases in the checking list			
	There is the approval website that allows AS to view the information of candidate, the registration form of that candidate & can approve/ reject that registration form and have field to note the reason of reject			
	Automatic arrange approved candidate by registered class			
BIZ.16	Mapping on SAP/DMS:	Must have		
	1. Candidate information will be mapped into SAP 2. Allow to extract information of approved applicants by AS			
BIZ.17	Allow to export/integrate with LMS training class information	Must have		
BIZ.18	Allow to import/integrate with LMS training result	Must have		
BIZ.19	Allow to import/integrate with SAP/DMS/other systems to active code	Must have		
BIZ.20	Report of Recruitment	Must have		
	Extract report as required, including but not limited: - Daily sub-waiting AD report	Must have		

Code No	Requirement description	Priority	Ability to response	Note
	- Daily submission report to AS - Others			
	Report could be extracted in format of MS Word, MS Excel, PDF...			
BIZ.21	In all steps of workflow, the system supports to record all interaction history: time, user made, including email sent by system.	Must have		
BIZ.22	Button to link to LMS/Salesportal	Must have		
BIZ.23	Workflow & Procedure management: Allow Admin user to set up/change workflow and procedure	Must have		
BIZ.24	User growth plan within 3 years: Number of users using the system: 35,000 users In which 10,000 users regularly use the system Concurrent user: $20\% * 10,000 = 2000$	Must have		
BIZ.25	System have to support users using Vietnamese	Must have		

Workflow illustration (for reference; the actual process may be changed):



2.2 Technical requirement

2.2.1 General requirement

Code No	Requirement description	Priority	Ability to response	
TECH.01	System must be 100% web-based for. All functions and modules must be accessible through on Web Browser for desktop mobile, tablet,...run on multiple device (IOS, Android, window...) (Reference BIZ.02)	Must have		
TECH.02	System has version mobile app which can run on IOS/Android	Should have		
TECH.03	System works well on popular browsers such as Safari, IE, Chrome, Firefox, IE ... (Reference BIZ.02)	Must have		
TECH.04	System must be designed responsively to work well on a variety of devices such as iPad, Tablet, Laptop, PC, and mobile phone. (Reference BIZ.02)	Must have		
TECH.05	System must have to adapted 30.000 users (Reference BIZ.24)	Must have		
TECH.06	Format language is Vietnam and English (Reference BIZ.25)	Must have		
TECH.07	System is an open solution that allows to easily change existing features and add new ones to the program. (Reference BIZ.23 and more BIZ in business requirements)	Must have		
TECH.08	Data Format: Response to requirements for displayed data format in accordance with the general standards of Vietnamese. Data types include: date, time, currency, full name,... Example: format date: DD/MM/YYYY, ... Format requirements are installed or configured on the system (Reference 2.10 UI / UX DESIGN REQUIREMENT)	Must have		
TECH.09	Display of data information tables ensures following UX / UI, and allows Sort / Filter right on the header of the data sheet. (Reference 2.10 UI / UX DESIGN REQUIREMENT)	Must have		

Code No	Requirement description	Priority	Ability to response	
TECH.10	Request to save log (File & DB) - event logs take place in the whole system to monitor, track to have solutions, support users and troubleshoot the system when having problems	Must have		

2.2.2 System responsibility requirement

Code No	Requirement description	Priority	Ability to response	Note
TECH.11	Fully satisfying user functions according to business requirements	Must have		
TECH.12	<p>The proposed system should at least meet the following performance requirements:</p> <ul style="list-style-type: none"> - Amount of concurrent users are 2000 - Response time for user interface $\leq 5s$; - Response time for logic processing actions (in the absence of integration with MBAL system) $\leq 5s$; - Response time for logic processing actions (in case of integration with MBAL system and excluding processing time of MBAL system) $\leq 5s$. <p>(Reference BIZ.24)</p>	Must have		
TECH.13	Capacity for next 30000 Agency (Reference BIZ.24)	Must have		
TECH.14	When deploying system on multiple physical servers, it is necessary to have a centralized log monitoring system to help users and troubleshoot the system, most effectively and most accurately in the shortest time.	Must have		
TECH.15	Provides frequent, reliable and easy to build and deploy, fast rollback	Should have		
TECH.16	Health Check & Service Check: Visibility Requirements not only displays information and metrics at the OS level, but also application health and other signals.	Should have		

Code No	Requirement description	Priority	Ability to response	Note
TECH.17	Service discovery and load balancing (Reference to TECH.17)	Should have		

2.2.3 Technology platform requirement

Code No	Requirement description	Priority	Ability to response	Note
TECH.18	Frontend programming language: ReactJS (for web browser) and React Native (for App Mobile)	Should have		
TECH.19	Backend programming language and integration: Java Spring Boot	Should have		
TECH.20	Supplier has experience in the field of Insurance and especially capability, experience in the SAP system	Should have		
TECH.21	System can connect to current MBAL's system (LMS, SAP, ...) and other systems in the future via integration standard as below: - File transfer: FTP, FSTP, FTPS - Data connection: JDBC, ODBC ... - Email: SMTP, POP3, IMAP ... - Message / Webservice: SOAP Service, Restful Service, JSON message (via https, https, and other authentication mechanisms), ISO8583, XML - Socket - Message Queue - Support to import/export excel file based on MBAL's formatted. (Reference to BIZ.04, BIZ.16, BIZ.19)	Must have		
TECH.22	System is required to parameter, configurations, all the dynamic forms and business process built by workflow engine which can be easily to create/customized by dragging/dropping and configuring by system admin. (Reference to BIZ.01, BIZ.23)	Must have		


Code No	Requirement description	Priority	Ability to response	Note
TECH.23	System is required to meet the technical identification and extraction of data from attached uploaded images (ID card, CCCD, Passport...) and automatically input information into e-registration form. (refer to OCR solution) Supplier have to state the solution and separate the quote for this requests (Reference to BIZ.11)			




2.2.4 Infrastructure, operation system, database requirement

Code No	Requirement description	Priority	Ability to response	Note
TECH.24	Supplier needs consult / provide solutions for servers, software, network equipment, security equipment ... necessary to develop a complete software system, capable of meeting MBAL's business requirements. at least within 03 years (from 2021 - 2024) (Reference to BIZ.23)	Should have		
TECH.25	Operating system: redhat 7.6 / windows server 2016 ...	Should have		
TECH.26	Database: Oracle/MySQL/PostgreSQL/MongoDB ...	Should have		
TECH.27	Application Server: Weblogic/Websphere/Apache Tomcat ...	Should have		
TECH.28	There are clear RAM, CPU, HDD, connection (port, type of application) requirements for each server	Must have		
TECH.29	Document Solution architecture (overall architecture, software architecture, infrastructure architecture)	Must have		

Code No	Requirement description	Priority	Ability to response	Note
TECH.30	In Data Center (DC) - System has an adequate high availability (HA) in a PRODUCTION environment. - There is an HA test script (shutting down the server or application) at a node, the service will not be interrupted In Disaster Recovery (DR) - Make sure to have automatic sync deployment from DC to DR. - There are documentation for switching DC to DR application and make sure the application in DR runs the same as in DC	Should have		
TECH.31	Contractor must provide, install, configure, and modify standard software at the Data Center (DC) and the Disaster Recovery (DR) on Development Environment (DEV) and provide / transfer of technology (documentation, script ...) for MBAL to install ourself on the real environment (Production)	Must have		

2.2.5 Information security requirement

Code No	Requirement description	Priority	Ability to response	Note
TECH.32	Response all regulations on privacy, information safety and network security according to Vietnamese regulations	Must have		
TECH.33	Software needs to be developed to meet requirements of MB Ageas Life's "Web / Application Security Standards".  44.2020.QD-TGD.M BAL_ Tieu chuan AT	Must have		

Code No	Requirement description	Priority	Ability to response	Note
TECH.34	<p>Server operating system that server system deployed should meet requirements of MBAL's "Security Standards for Server Operating System"</p>  <p>47.2020.QD-TGD.M BAL _ Tieu chuan AT</p>	Must have		
TECH.35	<p>System's web server needs to be deployed and configured to meet requirements of MBAL's "Security Standards for Web Server".</p>  <p>45.2020.QD-TGD.M BAL _ Tieu chuan AT</p>	Must have		
TECH.36	<p>Database management systems should be deployed and configured to meet requirements of MBAL's "Standards of security for database management systems".</p>  <p>46.2020.QD-TGD.M BAL _ Tieu chuan AT</p>	Must have		
TECH.37	<p>System / product after development / implementation should be independently reviewed and evaluated in terms of information security by: Contractor and IT department of MBAL. Accordingly, Contractor needs to fix all the security errors recorded based on the two assessment reports above for the average or higher security errors before the official golive time.</p> <p>The system may still have low level faults. These remaining defects can be handled within the warranty period but no longer than 6 months from the official product launch.</p> <p>For security errors arising during warranty and using time: Contractor should research and propose solutions to fix errors within 03 working days or within another suitable period agreed by MBAL.</p>	Must have		

2.6 Project management requirement

Code No	Requirement description	Priority	Ability to response	Note
TECH.38	Supplier must have an initial project plan: - Detailed information on work separation structure - Order and timeline for each activity - Proposal of personnel such as quantity, roles and responsibilities, skill requirements, business requirements, and experience requirements of team members - Master plan of project	Must have		
TECH.39	Supplier describes how to manage the project and manage change requests	Must have		
TECH.40	Supplier describes project organizational structure and roles of stakeholders for the project	Must have		
TECH.41	Provider describes project reporting mechanism	Must have		
TECH.42	Supplier should provide CVs and products by project participants	Must have		

2.7 Implementation requirement

Code No	Requirement description	Priority	Ability to response	Note
IMP.01	Requirements for timeline MBAL would like that the Proposed System should be implemented until June 2021 (Reference to Timeline on 2. Project Goal). The Product Contractor is required to provide a deployment schedule with reasonably detailed work items that meet the above requirements of MBAL.	Must have		

Code No	Requirement description	Priority	Ability to response	Note
IMP.02	Implementation requirements and timelines Design and development phase should comply with MBAL's requirements and throughout implementation of the project. Contractor must have at least six (06) milestones as follows: <ol style="list-style-type: none"> 1. Install proposed development environment 2. Collect requirements and analyze implementation shortages according to proposed plan 3. Design, develop and implement according to the proposed plan 4. System integration test (SIT) implemented according to proposed plan. 5. User acceptance test (UAT) carried out according to proposed plan. 6. Acceptance of operation (Go Live) implemented according to proposed plan 	Must have		
IMP.03	Requirements for testing Contractor is required to provide a test plan and acceptance plan for entire implementation of project. Test and acceptance plan must be approved by MBAL. Testing includes but is not limited to the following: <ol style="list-style-type: none"> 1. Functional, Integration testing 2. Security testing 3. Performance testing Contractor is responsible for preparing system test scripts and performing test content number 2 and 3	Must have		
IMP.04	Requirements for acceptance Whole operation of contract will be approved by formal acceptance process. Contract payment to Contractor will be made based on completion of acceptance works in full.	Must have		

Code No	Requirement description	Priority	Ability to response	Note
IMP.05	<p>Training</p> <p>MBAL considers training an important activity of the project implementation process. Contractor is responsible for training MBAL staff to meet the operational requirements of system. Training method should follow motto "training the trainer".</p> <p>Contractor must ensure that MBAL employees are fully trained in the operation of proposed System functions and that MBAL IT staff are adequately trained in the maintenance of system operations.</p> <p>All training documentation must be provided to MBAL. Training materials must be in Vietnamese. In case an original is in English, both English and Vietnamese versions must be provided to MBAL.</p>	Must have		
IMP.06	<p>Technology transfer</p> <p>Contractor is required to transfer all technologies by ensuring complete communication within the project. All technology of project must be transferred to MBAL so that MBAL can own entire proposed system without any outside assistance.</p> <p>Contractor is required to effectively transfer knowledge and technology to MBAL during the project participation process. Contractor can carry out technology transfer through various forms such as training, on-the-job practice, etc.</p> <p>Contractor is required to provide a transfer plan prior to project commencement. Transfer plan will be approved and monitored by MBAL. It is contractor's responsibility to ensure that the transfer plan is fully implemented</p>	Must have		

Code No	Requirement description	Priority	Ability to response	Note
IMP.07	Requirements for handover All handover documents must be provided in Vietnamese. Documentation of the project must be handed over in the project include: <ol style="list-style-type: none"> 1. Documentation describing range of functions and specifications in detail 2. Specification of system requirements 3. Solution architecture documents (overall architecture, software architecture, physical architecture / infrastructure) 4. Data conversion strategy (if any) 5. Strategy of testing, training and handing over 6. Source documentation and custom software 7. Integration testing plan 8. Installation and deployment documents 9. User manual of system 10. Metadata data warehouse 11. User acceptance report (UAT) 12. Maintenance documents 13. User manual and guide documents 14. Plans and training materials 15. Software copyright (if any) 	Must have		
IMP.08	Warranty Software provided by Contractor must come with a minimum one year free warranty.	Must have		

3. Proposal Submission

Your proposal should have:

- Your credentials (similar projects).
- Deliverables you will provide.
- Project schedule
- Post launch support services
- Budget
 - Project costs, by phase
 - Split by recurring and non-recurring cost

- Cost for Software, Hardware
 - Cost for OCR function
 - Cost for Maintenance
- Subcontractors (if any) who will work on the project.
- Contact of PIC of the project.

4. Evaluation Criteria

MBAL will evaluate proposals by the following criteria:

- Proposal completeness and professionalism.
- Good understanding of the project (our requirements, the scope of work and even the market).
- Out of box solution.
- Project schedule to meet our target timeline.
- Cost effectiveness.
- Planned speed of implementation