⊛ LANDBANK

SUPPLEMENTAL/BID BULLETIN NO. 2
For LBP-HOBAC-ITB-GS-20191126-02

PROJECT	:	**LANDBANK Service Desk Management System**
IMPLEMENTOR	:	**Procurement Department**
DATE	:	**December 23, 2019**

This Supplemental/Bid Bulletin is issued to modify, amend and/or clarify certain items in the Bid Documents. This shall form an integral part of the Bid Documents.

Modifications, amendments and/or clarifications:

- The Terms of Reference (Annex A), Section VII (Specifications) and the Checklist of the Bidding Documents (Item Nos. 8, 15 & 17 of the Eligibility and Technical Component) have been revised. Please see attached revised Annexes A-1 to A-16 and specified sections of the Bidding Documents.

MA. VICTORIA C. VIRAY
Officer-In-Charge
Procurement Department

Specifications

Specification	Statement of Compliance **Bidders must state below either "Comply" or "Not Comply" against each of the individual parameters of each Specification stating the corresponding performance parameter of the equipment offered.** Statements of "Comply" or "Not Comply" must be supported by evidence in a Bidders Bid and cross-referenced to that evidence. Evidence shall be in the form of manufacturer's un-amended sales literature, unconditional statements of specification and compliance issued by the manufacturer, samples, independent test data etc., as appropriate. A statement that is not supported by evidence or is subsequently found to be contradicted by the evidence presented will render the Bid under evaluation liable for rejection. A statement either in the Bidders statement of compliance or the supporting evidence that is found to be false either during Bid evaluation, post-qualification or the execution of the Contract may be regarded as fraudulent and render the Bidder or supplier liable for prosecution subject to the provisions of **ITB** Clause 3.1(a)(ii) and/or **GCC** Clause 2.1(a)(ii)

LANDBANK Service Desk Management System
 	
For current and past suppliers of information technology hardware and/or software for LANDBANK, they must have satisfactory performance in their completed contracts starting in November 2018 onwards.
 	
A. Specifications:
 	
  ▪ LANDBANK Service Desk Management System, inclusive of the following:
 	
  ✓ User License Requirements
 	
    ➢ One (1) License for Administrator Agent
	Please state here either "Comply" or "Not Comply"

> One (1) License for Alternate Administrator Agent

> Fifteen (15) Licenses for Technical Support Agents

> Twenty (20) Licenses for Concurrent Users for the Analyst

> Unlimited creation of number of users who can log problems/ request

✓ Three (3) Years Maintenance Services

✓ Three (3) Years Support Services

✓ Trainings

> Available on-line and in-person

> At least two (2) sessions of user training

- The bidder must:

✓ comply with the requirements in relation to Third Party/Vendor Assessment conducted by the bank

✓ be a certified distributor/reseller of the product being offered

✓ **have successfully implemented or its principal the proposed solution for at least three (3) regional or local institutions in the Philippines**

✓ have members of the Project Team with at least three (3) years technical experience with the proposed solution

Minimum specifications and other requirements per attached **Revised Annexes A-1 to A-16.**

B. Documentary Requirements

The following documents shall be submitted inside the First Envelope:

1. Duly filled-out **Revised Terms of Reference** signed in all pages by the authorized representative/s of the bidder.

2. Certification from the principal company as distributor/reseller of the product being

offered.

3. Certification for the following Information Technology Infrastructure Library process from a third party, like PinkVerify, to wit:

   ➤ Change Management

   ➤ Incident Management

   ➤ Problem Management

   ➤ Request Fulfillment

4. **Self-Certification of the bidder (or its principal) stating that it has successfully implemented its proposed solution to at least three (3) regional or local institutions in the Philippines (indicate the company name, name of project, contact numbers and email address of vendor clients). For projects implemented by the principal, the latter should also issue a certificate of good standing to the bidder-supplier.**

5. List of the Project Team members with resume, indicating at least three (3) years technical experience with their proposed solution.

6. **Certificate of Satisfactory Performance issued by the Head, Data Center Management Department (DCMD) not earlier than 30 calendar days prior to the deadline of submission of bid (applicable only for current and past suppliers of information technology hardware and/or software for LANDBANK). The Certificate shall still be subject to verification during the post-qualification of bid.**

   Note: **Certificate of Satisfactory Performance shall be requested in writing from Ms. Josie M. Castro, Head of DCMD at 16th floor, LANDBANK Plaza Building with contact number 8-522-0000 local 7600, at least five (5) working days prior to the submission of bid.**

Non-submission of the above mentioned documents may result in bidder's disqualification.

Conforme:

_____
Name of Bidder

_____
Signature over Printed Name of
Authorized Representative

_____
Position

Checklist of Bidding Documents for Procurement of Goods and Services

Documents should be arranged as per this Checklist. Kindly provide folders or guides, dividers and ear tags with appropriate labels.

First Envelope - Eligibility and Technical Components

- **The First Envelope shall contain the following:**

  o **Eligibility Documents – Class "A"**

Legal Eligibility Documents

1. PhilGEPS Certificate of Registration under Platinum Membership (all documents enumerated in its Annex A must be updated); or all of the following:

   - Registration Certificate from SEC, Department of Trade and Industry (DTI) for sole proprietorship, or CDA for cooperatives, or any proof of such registration as stated in the Bidding Documents;

   - Valid and current mayor's/business permit issued by the city or municipality where the principal place of business of the prospective bidder is located, or equivalent document for Exclusive Economic Zones or Areas; and

   - Tax Clearance per Executive Order 398, Series of 2005, as finally reviewed and approved by the BIR.

Technical Eligibility Documents

2. Duly notarized Omnibus Sworn Statement (sample form - Form No.6)

3. Duly notarized Secretary's Certificate attesting that the signatory is the duly authorized representative of the prospective bidder, and granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the prospective bidder in the bidding, if the prospective bidder is a corporation, partnership, cooperative, or joint venture (sample form - Form No. 7).

4. Statement of the prospective bidder of all its ongoing government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the last five (5) years from the date of submission and receipt of bids. The statement shall include all information required in the sample form (Form No. 3).

5. Statement of the prospective bidder identifying its single largest completed contract similar to the contract to be bid, equivalent to at least fifty percent (50%) of the ABC supported with contract/purchase order, end-user's acceptance or official receipt(s) issued for the contract, within the relevant period as provided in the Bidding Documents. The statement shall include all information required in the sample form (Form No. 4).

6. Bid security in the prescribed form, amount and validity period (ITB Clause 18.1 of the Bid Data Sheet).

7. Section VI - Schedule of Requirements with signature of bidder's authorized representative.

8. **Revised Section VII - Specifications with response on compliance and signature of bidder's authorized representative.**

Financial Eligibility Documents

9. The prospective bidder's audited financial statements, showing, among others, the prospective bidder's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.

10. The prospective bidder's computation for its Net Financial Contracting Capacity (NFCC) following the sample form (Form No. 5), or in the case of Procurement of Goods, a committed Line of Credit from a Universal or Commercial Bank.

o **Eligibility Documents – Class "B"**

11. Valid joint venture agreement (JVA), in case the joint venture is already in existence. In the absence of a JVA, duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. Each partner of the joint venture shall submit its legal eligibility documents. The submission of technical and financial eligibility documents by any of the joint venture partners constitutes compliance, provided, that the partner responsible to submit the NFCC shall likewise submit the statement of all its ongoing contracts and Audited Financial Statements.

o   **Technical Documents**

12. Duly filled-out **Revised Terms of Reference** signed in all pages by the authorized representative/s of the bidder.

13. Certification from the principal company as distributor/reseller of the product being offered.

14. Certification for the following Information Technology Infrastructure Library process from a third party, like PinkVerify, to wit:
    ➢ Change Management
    ➢ Incident Management
    ➢ Problem Management
    ➢ Request Fulfillment

15. **Self-Certification of the bidder (or its principal) stating that it has successfully implemented its proposed solution to at least three (3) regional or local institutions in the Philippines (indicate the company name, name of project, contact numbers and email address of vendor clients). For projects implemented by the principal, the latter should also issue a certificate of good standing to the bidder-supplier.**

16. List of the Project Team members with resume, indicating at least three (3) years technical experience with their proposed solution.

17. **Certificate of Satisfactory Performance issued by the Acting Head, Data Center Management Department (DCMD) not earlier than 30 calendar days prior to the deadline of submission of bid (applicable only for current and past suppliers of information technology hardware and/or software for LANDBANK).**

o   Post-Qualification Documents – [The bidder may submit the following documents within five (5) calendar days after receipt of Notice of Post-Qualification]:

18. Business Tax Returns per Revenue Regulations 3-2005 (BIR No.2550 Q) VAT or Percentage Tax Returns for the last two (2) quarters filed manually or through EFPS.

19. Latest Income Tax Return filed manually or through EFPS.

Second Envelope – Financial Component

- **The Second Envelope shall contain the following:**

    1. Duly filled out Bid Form signed by the bidder's authorized representative (sample form - Form No.1)

    2. Duly filled out Schedule of Prices signed by the bidder's authorized representative (sample form - Form No.2)

LANDBANK SERVICE DESK SYSTEM TERMS OF REFERENCE

Instructions on responding to this Terms of Reference (TOR) Document

a. The vendor/bidder understands and agrees that the requirements specified in this document are deliverables for the proposed refresh of IT Service Management System.
b. All deliverables, its specifications and functionalities, must be satisfied including its necessary prerequisites without additional cost to the Bank.
c. The vendor/bidder must answer at the third column whether the [solution requirement] complies or not—answer must be **YES** or **NO.**
d. The REMARKS column in the table is to be filled out according to the response in the third column:

> d.1. If answer to the third column is YES: REMARKS column is to be filled out with the complete and specific reference to the supporting *document* included in the bidding document to support answer/claim
>
> d.2. If the answer to the third column is NO: REMARKS column is to be filled out with the justifications why the proposed DBF cannot meet the specified requirement; include the complete and specific reference to the supporting document included in the bidding document to support answer/claim

The supporting documents, cited references to the Service Desk System TOR should be indexed or labeled accordingly for easy identification and validation.

LANDBANK SERVICE DESK MANAGEMENT SYSTEM TERMS OF REFERENCE

REFERENCE	REQUIREMENT	WILL COMPLY? YES/NO	REMARKS
1.1	Must be manageable via a user-friendly, web-based console that can only be accessed by the administrators and technical support agents		
1.2	Must provide out-of-the box workflows, without any fancy installation, supporting IT Service Management (ITSM) processes		
1.3	Must have the capability for the users to quickly create their own dashboards (pie charts/bar charts) from any data in the system		
1.4	Must have the capability to provide search capabilities for open or closed incidents or service requests		
1.5	Must be accessible via a standard web connection		

Revised Annex A-1

1.6	Must have the capability to enable rapid deployment of ITSM modules		
1.7	Must have the capability to provide industry and Information Technology Infrastructure Library (ITIL) best-practice processes, categorization and templates embedded in tool		
1.8	Must have a mobile facility to progress the request via email or mobile application or SMS		
1.9	Must be as simple as drag and drop and no coding or programming required for the administrators		
1.10	Must have the capability to configure and maintain staging, testing and production environments		
1.11	Must have the capability to be flexible, customizable and configurable according to custom requirements without impacting system core functionalities		
1.12	Must support various date formats and currencies		
1.13	***Must support data separation among access of users per department/group in a single server.***		
1.14	Must be able to read, import and share data from other sources		
1.15	Must be able to write, export and share data with other sources		
1.16	Must support multiple languages		
1.17	Must support integrations with any Open Database Connectivity (ODBC) compliant data sources		
1.18	Must support integrations with Microsoft Active Directory and any other Lightweight Directory Access Protocol (LDAP) compliant sources		
1.19	Must support integration with e-mail services		
1.20	Must support automatic translation of text		
1.21	Must have the capability to configure workflows and business rules without any external code (i.e. Codeless)		
1.22	Must have the capability to quickly scale-up and scale-down within minutes		
1.23	Must have the flexibility to be deployed on-premise, in containers, in the public cloud or on virtual		

Revised Annex A-2

	environments		
1.24	Must automate the existing process using the tool.		
1.25	Must have a native mobile application for end-users to search for knowledge, and request service / support		
1.26	Must support field level encryption		
1.27	Must support single sign-on		
1.28	Must allow administrators to define rules associated with passwords.		
1.29	Must have the capability to encrypt all passwords used in the application.		
1.30	Must have the capability to support Secure Sockets Layer (SSL).		
1.31	Must be easy to upgrade, with minimal downtime		
1.32	Must provide new releases, upgrades, and patches for the tool		
1.33	Must have the capability to view out-of-the-box reports or create your own reports based on record type		
1.34	Must have the capability to save reports publicly or privately with appropriate permissions		
1.35	Must have a native out-of-the box Data Analytics capabilities		
2.1	Must include one administrator agent and one alternate administrator agent		
2.2	Must include fifteen (15) technical support agents		
2.3	Must be able to accommodate twenty (20) concurrent users for the analyst		
2.4	Must include creation of unlimited number of users who can log problems/request		

Revised Annex A-3

3.1	Must provide a customer self-service portal where a customer may access knowledge-based articles, submit requests, and monitor the status of their requests		
3.2	Must have a type-ahead feature (i.e. Google like search)		
3.3	Must provide an end-user interface through which employees can order standardized goods and services from various groups (e.g. HR, IT, Admin)		
3.4	Must provide self-service portal with company's colors and logos		
3.5	Must provide availability of a hot news section for current major problems, such as outages and scheduled downtimes		
3.6	Must support the capability to attach a screenshot of the error message to the ticket		
3.7	Must have the capability of end user chat on self-service portal which must operate continuously with proposed Service Desk Solution		
3.8	Must have Virtual agent capability to simulate the way a human being responds to a question by suggesting Knowledge Management document links and Service Catalog item links or automating common cases		
3.9	Must have the capability for enhanced virtual agent that supports Natural Language Understanding		
3.10	Must have the capability to transfer chat request from Virtual agent to Live Agent upon end user request		
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4.1	Must support the creation, modification, resolution and closure or cancellation of incident records		
4.2	Must support the capability to automatically generate a unique case number to each request		
4.3	Must have the capability to link Incidents to Problem Records, Knowledge Base, known workarounds and RFCs		
4.4	Must have the capability to automatically link to the Configuration Management database or		

Revised Annex A-4

	Configuration Management data from the text entered in the description		
4.5	Must have the capability to notify incident owners when the associated problem is resolved		
4.6	Must have the capability for storing historical incident data and other Incident related information including an audit log with updates and resolutions		
4.7	Must have the capability to automatically create a Problem, Change, Knowledge-based article, News Item, Request		
4.8	Must have a flexible search capability for incident matching and trending		
4.9	Must have the capability to facilitate the automatic prioritization, assignment and escalation of Incidents based on the record categorization		
4.10	Must have the capability to automate incident models and workflow based on record classification		
4.11	Must have the capability to support hierarchical escalation, either manually or via business rules, upon incident status change, priority change and/or service-level clock expiration		
4.12	Must have the capability to integrate with event and alert monitoring tools, and allow for automatic creation, update and closure of tickets from these tools		
4.13	Must have the capability to input free text, screen captures, and file attachments for the recording of incident descriptions and resolution activities		
4.14	Must have the capability to associate incident records to user and customer data		
4.15	Must have the capability to use configurable closure classification codes upon incident closure		
4.16	Must have the capability to use knowledge and/or support scripts for incident diagnosis and resolution		
4.17	Must have the capability to create several tasks in the scope of a unique incident record		
4.18	Must have the capability to create different workflows depending on the incident category		

Revised Annex A-5

4.19	Must have the capability for hierarchical notification about incidents that exceed or will soon exceed Priority/SLA parameters		
4.20	Must have the capability to put incidents on hold so time does not count against SLA		
4.21	Must have the capability to differentiate between an incident and a service request		
4.22	Must have the capability to see time left until the next Service Level Target on response time (associated with priority or SLA)		
4.23	Must have the capability to resolved tickets that will automatically trigger an email to the user		
4.24	Must have the capability to automate ticket closure at a predetermined number of business days after a ticket enters resolved status		
4.25	Must have the capability to reactivate incident in resolved status		
4.26	Must have the capability to automatically determine the ticket priority by impact and urgency		
4.27	Must have the capability to track trends to help identify consistent problem areas and potential long-term resolutions		
4.28	Must have the capability to automatically assign incidents to a resolution group and notify monitoring groups, based on established rules, with the capability for the operator to override when necessary		
4.29	Must have the capability to automatically determine urgency and priority, based on the specific failed component, with the capability for the operator to override when necessary		
4.30	Must have the capability to automatically notify appropriate support and management personnel based on established rules (for example: specific failed component, priority, severity, time of day, day of week)		
4.31	Must be age sensitive, notifying appropriate support and management personnel based on the age of an unresolved problem		

Revised Annex A-6

4.32	Must have the capability to create a full audit track, with the capability to show who modified the record and the capability to recreate the record at any point in the record's life cycle		
4.33	Must have the capability to automatically open an incident ticket when a failed component is identified by a network and systems management tool		
4.34	Must have the capability to keep track of the total time the incident was worked while open. This total time should not include suspended or frozen state time. The time should be stopped by individual.		
4.35	Must have the capability to fully incorporate with change, configuration item, service level, and problem management solutions		
4.36	Must have the capability to allow users to suspend work on an incident. Incident can be unsuspended or resumed by the same user or others.		
4.37	Must have the capability to allow users to see how the Service Level Management is performing, using out-of-the-box reports		
4.38	Must propose a fully incorporated runbook automation tool that can be used for the following:		
4.38a	a. Must have the capability to automate Incidents to perform diagnostics and repair procedure to fix services, such as restarting the service, install desktop software, reset password and extended to complete procedures such as recovery of server or application		
4.38b	b. Must have the capability to auto-fulfil the requests coming from end users through self-service portal such as Microsoft Exchange configuration		
REQUEST FULFILLMENT			
5.1	Must have the capability to maintain a catalog of approved products and services for easy end user reference		
5.2	Must have the capability to display workflow clearly		
5.3	Must have the capability to allow end users to facilitate and track their own requests, decreasing help desk involvement and wasted man-hours		

Revised Annex A-7

5.4	Must have the capability for the request tasks to be planned ahead of actual request using task templates and request models to save time of repetitive tasks and requests by automation of tasks		
5.5	Must have the capability for the request tasks to be presented clearly to show the completion of planned tasks against which phase in Request Workflow		
5.6	Must have the capability for the request tasks to be planned in sequential or parallel order depending on the request use case to automate this request execution		
5.7	Must provide Task Automation execution for repetitive requests, using composition workflows to automate request fulfilment which is required for set of use cases that will be agreed on during design workshop		
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6.1	Must provide an end user interface through which employees can order standardized IT goods and services		
6.2	Must provide capability to search the catalog as well as navigate through it hierarchically		
6.3	Must provide user-options for items		
6.4	Must support ordering of bundles		
6.5	Must have the capability for the requestor to save their cart either to work on later or to save as a template for future requests		
6.6	Must have the capability to define repetitive costs associated to an item (i.e. monthly service cost)		
6.7	Must be easy to administer and maintain		
6.8	Must provide access controls on the item level (Users can only order items for which they have access/permission to order)		
6.9	Must provide catalog offering for managing Security Operations in the enterprise through breach reporting by employees and security incident management		

Revised Annex A-8

6.10	Must have the capability to defined Delivery/Fulfilment Service Levels		
6.11	Must have the capability for the end-users to track the status of their request via a web interface		
6.12	Must have the capability to import from external catalogs		
6.13	Must have the capability to define approval requirements		
6.14	Must provide support for simple and complex approval matrices		
6.15	Self-Service Approvals - Must have the capability to approve requests, changes and knowledge articles via self-service interface		
6.16	Must have the capability to be able to view the catalog and cart items in their local currency		
7.1	Must align with ITIL v.3 Problem Management processes		
7.2	Must be a separate process (not a subset of the incident management processes)		
7.3	Must distinguish between problems and known errors		
7.4	Must support multiple phases as defined by ITIL		
7.5	Must enable the automated matching of incidents to problems and known errors		
7.6	Must be able to relate and link problems to specific incidents		
7.7	Must be able to relate multiple incidents to a single problem		
7.8	Must provide the capability to categorize problems		
7.9	Must be able to relate problems to configuration item records		
7.10	Must display problem workflow clearly		

Revised Annex A-9

7.11	Must have the capability to assign problems and problem tasks to problem analysts and track problem resolution		
7.12	Must have the capability to associate a problem with a Request for Change (RFC) once a resolution or change has been identified		
7.13	Must provide a secure historical audit log of all updates to problem records		
7.14	Must be able to track known errors as separate records		
7.15	Must have the capability to link problem records to multiple incidents, configuration items, and known error records		
7.16	Must have the capability to assign and track multiple tasks and multiple parties		
7.17	Must have the capability to document root cause and work-around for each task		
7.18	Must have the capability to designed process flow that are visible in every problem record, along with the current status of the process activity		
7.19	Support for Proactive Problem Management – Must have the capability to reduce time to identify problem with Incident Analytics capability		
7.20	Must provide analytics capabilities by using the structured and non-structured data to present a heat map of grouped issues, and be able to see the trends and directly create problem tickets from that		
7.21	Must include the option to filter and zoom into smaller sets of data as needed		
8.1	Must align with ITIL Change Management processes		
8.2	Must have the capability to integrate Operational change solution with Service Desk		
8.3	Must have the support for the complete Change		

Revised Annex A-10

	lifecycle		
8.4	Must provide an unlimited number of change categories/types		
8.5	Must provide an unlimited number of change phases and tasks for a change		
8.6	Must have a tailorable change workflow		
8.7	Solution must support templates to accelerate change request data entry		
8.8	Must be able to control the release of phases and tasks (concurrently or sequentially)		
8.9	Must be able to open a change directly from an incidents or problems and pre-populate the change with fields from the incident, problem and configurations item records		
8.10	Must capture actual and scheduled start/end dates as well as special instructions, back-out plans etc.		
8.11	Must allow for RFCs to be assigned and reassigned to individuals or groups		
8.12	Must support creation of tasks (work processes) that can be assigned to individuals as part of the change process		
8.13	Must handle the change process from the point of request through acceptance, scheduling, approval, review, coordination and cost accounting		
8.14	Must display the workflow graph in its implementation approach, so IT audience can see what steps have been taken and which are pending		
8.15	Must be able to accommodate mass changes		
8.16	Must facilitate the task of updating the configuration item information in the Configuration Management System		
8.17	Must have a support for attachments and links to external documents such as test or back-out plans		
8.18	Must have a support for groups of changes (releases)		
8.19	Must have a support release and deployment management as part of the change process		

Revised Annex A-11

8.20	Must have the capability to model the effects of changes and see the potential impact to the infrastructure		
8.21	Must have the capability to consolidate view of forward schedule of change		
8.22	Must provide pre-emptive notification to stakeholders and members for changes with critical business impact, collision and compliancy issues		
8.23	Must provide an automated and flexible approval process; supports simple to complex approval models		
8.24	Must have the capability to approve, retract or reschedule a change online prior to or during stakeholders/ members meeting		
8.25	Must provide tight integration with Configuration Management and the Configuration Management Database		
8.26	Must provide change calendar		
8.27	Must have the capability to look at the history and success rates, and risk profiles of similar past changes		
8.28	Must have the capability to automatically suggest improvements in the change management process to improve the success rate of the changes		
8.29	Must provide complete audit trail of all change decisions		
8.30	Must have the capability to facilitate post-implementation review		
8.31	Must provide automatic evaluation of compliancy with maintenance windows and blackout periods		
8.32	Must provide automatic notification to change stakeholders		
8.33	Must be able to create a task plan by each change record		
9.1	Must provide a fully integrated Knowledge Management module		

Revised Annex A-12

9.2	Must support Knowledge-Centered Support (KCS) standards and guidelines.		
9.3	Must provide Knowledge Management reports out-of-box		
9.4	Must use the description field from the ticket to search the knowledge		
9.5	Must auto-populate the resolution field in the ticket from the knowledge article when a solution is found		
9.6	Must support a variety of search methodologies including:		
9.6a	a. Must be able to visualize and drill down to frequently searched articles, user questions and group them together, and easily create a new Knowledgebase Article for these questions		
9.6b	b. Must have the capability to retrieve solutions based on any field (including user defined) such as category, problem, device, as well as natural language search support		
9.6c	c. Must have the capability to create an FAQ section based on categories		
9.6d	d. Must have the capability to allow user feedback to rate/score content for usefulness related to the inquiry		
9.6e	e. Must have the capability to determine the user's profile on what knowledge documents they are allowed to search and view and publish		
9.6f	f. Must have the capability to create, draft, update, copy and publish to knowledgebase's based on role or access to categories. Publishing to some categories and publishing of some types of documents should be role based as well		
9.6g	g. Must have the capability for users to flag incidents or problems as candidate solutions for the knowledgebase		
9.7	Must have a defined workflow process for reviewing and approving pending knowledge articles. Must be displayed graphically		
9.8	Must be able to make certain fields in the knowledge article template mandatory		

Revised Annex A - 13

9.9	Must be able to control the capability to edit existing knowledgebase articles, following the Knowledge-Centered Support (KCS) authoring process		
9.10	Must have the capability to establish expiration dates that drive update alerts to the document owner and control visibility		
9.11	Must provide a resolution process related to contested document information		
9.12	Must have a pre-defined knowledge article templates such as How-To, Problem-Solution, Reference, Error Message/Cause, and External		
9.13	Must allow a single knowledge article to contain some content that is visible only to certain consumers		
9.14	Must allow knowledge to be created directly from incident, problem and known error records		
9.15	Must provide document retirement (expiration dates, notifications etc.)		
9.16	Must provide simple, web-based graphical user interface		
9.17	Must be able users to find FAQs and the solutions to common incidents and avoid contacting the service desk		
9.18	Must provide the capability to count how many times the users were able to solve problems using the knowledgebase and which items solved problems		
9.19	Must provide security according to defined user roles (access levels to content, document approvals, authoring, and so on)		
10. TECHNICAL SUPPORT REQUIREMENTS			
10.1	Must provide three (3) years maintenance support agreement, including licenses.		
10.2	Vendor support resources must be available at the times required (Monday to Friday, 8am to 5pm - onsite support; 24/7 – email support) for three (3) years		

Revised Annex A-14

10.3	Product must be well-documented on vendor website, and active user communities exist to solve technical problems		
10.4	Consulting and support expertise must be available in the Philippines and/or Asia Pacific		
███████	███████████████████████	███	████
11.1	Training must be available online and in person		
11.2	Must provide at least two (2) sessions of user training for the representatives of various departments/units		
███████	███████████████████████	███	████
12.1	The Vendor must comply with the requirements in relation to Third Party/Vendor Assessment conducted by the Bank.		
12.2	The bidder must have a certification of distributorship/resellership of the Principal Company.		
12.3	The vendor must submit certification for the following Information Technology Infrastructure Library (ITIL) process from third party like PinkVerify. To wit, • Change Management • Incident Management • Problem Management • Request Fulfilment		
12.4	*The bidder (or its principal) must submit a self-certification stating that it has successfully implemented its proposed solution to at least three (3) regional or local institutions in the Philippines (indicate the company name, name of project, contact numbers and email address of vendor clients).* *For projects implemented by the principal, the latter should issue a certificate of good standing to the bidder – supplier.*		
12.5	Members of the Project Team of the vendor must have at least three (3) years of technical experience with their proposed solution. The resume of the members of the Project Team must be submitted and will be included in the post-qualification of the vendor.		

REVISED ANNEX A-15

13.1	Must be able to deliver the proposed solution and related components within 90 calendar days upon receipt of the Notice to Proceed.		

PREPARED BY: APPROVED BY: NOTED BY:

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Revised Annex A-16