

**SUPPLEMENTAL/BID BULLETIN NO. 2**  
**For LBP-ICTBAC-ITB-GS-20231107-01**

**PROJECT** : Supply, Delivery and Installation and Configuration of LANDBANK Service Desk Management Systems with Three (3) years Maintenance Support.

**IMPLEMENTOR** : **ICT-BAC Secretariat Unit**

**DATE** : **January 04, 2024**

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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:

1. The bidder/s is/are encouraged to use the Bid Securing Declaration as Bid Security.
2. Bidder/s is/are reminded to coordinate directly with PhilGEPs to update their requirements for their Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR of RA 9184.
3. The Terms of Reference (Annexes D-1 to D-26), Section VII. Technical Specifications and Checklist of Bidding Documents (Item No. 12 of the Technical Documents) have been revised. Please see attached revised items and specific sections of the Bidding Documents.
4. Responses to bidder's query/clarifications per attached Annexes H-1 to H-5.

  
**ATTY. AUXILADOR AVITUS D. DOFELIZ**  
HEAD, ICT-BAC Secretariat Unit

**RESPONSES TO BIDDER'S QUERIES AND/OR SUGGESTIONS**

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| <b>DATE</b>                                  | January 5, 2024  |
| <b>PROJECT IDENTIFICATION NO.</b>            | ITB-GS-20231107-01   |
| <b>PROJECT NAME</b>                          | Supply, Delivery, Installation and Configuration of LANDBANK Service Desk Management System with Three (3) Years Maintenance and Support |
| <b>PROPOSER UNIT/TECHNICAL WORKING GROUP</b> | DATA CENTER MANAGEMENT DEPARTMENT  |

| <b>ITEM NO.</b> | <b>PORTION OF BIDDING DOCUMENTS</b>  | <b>QUERIES AND/OR SUGGESTIONS</b>   | <b>LANDBANK'S RESPONSES</b>  |
|-----------------|--|---|--|
| 1               | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b>                         | Does this include if LBP requires a Highly Available(HA) solution? Number of servers will increase in HA configuration  | <p>We would like to limit the servers up to 3 only</p> <p>Revised in TOR 3.12</p> <p><b>3.12 Server requirement for on-premise deployment must be 3 servers only</b></p>   |
|                 | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b>                         | Does this include if LBP requires a Highly Available(HA) solution? Number of servers will increase in HA configuration  | <p><b>No. There will be separate servers for the dev environment</b></p> <p>3.10 Must be capable of deploying development, UAT environments without additional licenses cost. The system should be capable of taking database backup along with the attachment files on DR site.</p> |
| 2               | Terms of Reference (TOR) 19. <b>QUALIFICATION AND DOCUMENTARY REQUIREMENTS</b> | <p>Under Documentary requirement, "Member of the Local Project Team of the vendor must have at least three (3) years of technical experience with their proposed solution and must have at least two (2) product certified engineers</p> <p>Can you kindly consider the following members of the Project Team, in order to comply to the requirement?</p> <p>- 1 x Technical Lead – more than 7 years of experience in delivering several ITSM solution with proof of Training certification(with</p> | <p><b>No.</b></p> <p>Members of the Local Project Team of the vendor must have at least three (3) years of technical experience with their proposed solution and must have at least two (2) product certified engineer</p>   |

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|   |   | assessments) for the proposed solution.<br>- 1 x Technical Engineer – Less than 3 years but more than 2 years experience in the proposed solution and has been certified by the proposed Software   |  |
| 3 | Terms of Reference (TOR) 19.<br><b>QUALIFICATION AND DOCUMENTARY REQUIREMENTS</b> | Under Documentary requirement, "The Bidder must have completed at least three (3) similar system solution implementations of the proposed solution for the last five (5) years in the Philippines"<br>Can we clarify if the bidder can provide a completed or on-going project for any ITSM related product? This will show that the bidder has extensive experience in ITIL framework and ITSM projects. | <b>No.</b><br><b>QUALIFICATION REQUIREMENT</b><br><i>The bidder must have completed at least three (3) similar system solution implementation of the proposed solution for the last five (5) years in the Philippines.</i><br><b>DOCUMENTARY REQUIREMENTS</b><br>List of three (3) completed or on-going projects for the last five (5) years in the Philippines. Include company name, name of project, contact numbers and email address of vendor's clients supported with copies of Purchase Order, Contracts or equivalent documents. |
| 4 | Terms of Reference (TOR) 15.4   | "Must provide ITIL training to create awareness and alignment of LBP resources on the best practices that will be adopted by LBP"<br>Will this include the ITIL certified Exam for the attendees, or this is an ITIL non-certified basic training for all IT in LBP? For how many batches and attendees? ABC might not accommodate too many CERTIFIED courses and exam.                                   | <ol style="list-style-type: none"> <li>1. ITIL non-certified basic training for service desk personnel.</li> <li>2. One (1) Batch for at least 12 service desk personnel</li> <li>3. ITIL non-certified basic training for service desk personnel</li> </ol> <p><b>Revised in TOR 15.4</b></p> <p><b>15.4 Must provide ITIL non-certified basic training to create awareness and alignment of LBP resources on the best practices that will be adopted by LBP.</b></p>   |

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| 5  | Terms of Reference (TOR) 19. <b>QUALIFICATION AND DOCUMENTARY REQUIREMENTS</b> | Under Documentary Requirement, "The original equipment manufacturer (OEM) of the proposed solution should be present in the market for at least ten (10) years and should not have End of Service (EOS) for 5 years from the time of acquisition"<br>For the EOS requirement, may we request if it can be reduced from 5 to 3 years from the time of acquisition? | <b>No.</b><br><br>Proof or documentation from the manufacturer that the model/product should not have End of Service (EOS) for 5 years from the time of acquisition.                                 |
| 6  | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b>                         | Can the vendor propose a SaaS/Cloud service desk management system instead of on-premise setup?   | <b>Yes.</b><br><br>3.1 Must be deployed on-premise, cloud ready or cloud and supports a virtual machine environment  |
| 7  | Terms of Reference (TOR) 18. <b>OTHER PROVISIONS</b>                           | We would like to inquire if Electronic Annual Financial statement (AFS) or EAFS is acceptable?  | <b>Yes.</b>  |
| 8  |  | Can we send a letter of confirmation that Application Penetration Testing Result without critical risk findings from 3rd party service provider is available during bid submission, and share the actual result when awarded and NDA is both signed by the parties?   | <b>No. We don't require.</b>   |
| 9  | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b>                         | What environments (e.g. prod, dev) are expected to be installed by the bidder?  | 3.10 Must be capable of deploying development, UAT environments without additional licenses cost. The system should be capable of taking database backup along with the attachment files on DR site. |
| 10 | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b>                         | The number of servers (2-3) only is intended for production environment only?   | <b>Yes. The servers are intended for production environment only.</b><br><br><b>Revised in TOR 3.12</b><br><br><b>3.12 Server requirement for on-premise deployment must be 3 servers only</b>       |



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| 11 | Terms of Reference (TOR) 3. <b>SYSTEM REQUIREMENTS</b> | What is the preferred deployment on-premise or cloud?   | On-prem, cloud or cloud ready.<br><br>3.1 Must be deployed on-premise, cloud ready or cloud and supports a virtual machine environment.   |
| 12 |  | Is the bidder expected to include data migration as part of the services? If yes, what types of data will be migrated (e.g. incidents, requests, etc..)   | <b>Yes. Data from the existing service desk.</b>  |
| 13 |  | How many are expected to be trained for agent and administration? Is the bidder expected to train end-users?  | <ol style="list-style-type: none"> <li><b>Agent and administration are helpdesk personnel.</b></li> <li><b>No. The helpdesk personnel will train the end-users.</b></li> </ol><br><b>Twelve (12) Help Desk personnel.</b> |
| 14 |  | Could you please provide details on the scope of implementation for SLA/OLA configurations, service request forms, approval workflows.  | <b>The scope of the systems includes service module, change module, incident module, management module, problem management module, knowledge management module with at least 15 SLAs.</b>                                 |
| 15 |  | Just to confirm, the administrator and alternate administrator agents are unique named users? Total licences required is 40 concurrent and 10 named licenses? Overall total is 50 agent licenses? | <b>Yes.</b>   |
| 16 |  | When will be the start and end date of the Support and maintenance?   | <b>Start date shall start upon go live of the system.</b>   |

Prepared by:

  
**MARY JANE L. RAMIREZ**

Name and Signature of Assigned

Reviewed by:

  
**JONES J. BALLESTEROS**  


Head, DCMD


*Annex*

*H-4*

**RESPONSES TO BIDDERS' QUERIES AND/OR SUGGESTIONS**

|                                   |   |
|-----------------------------------|---|
| <b>DATE</b>                       | January 04, 2024  |
| <b>PROJECT IDENTIFICATION NO.</b> | LBP-ICTBAC-ITB-GS-20231107-01   |
| <b>PROJECT NAME</b>               | Supply, Delivery and Installation and Configuration of LANDBANK Service Desk Management Systems with Three (3) years Maintenance Support. |

| <b>ITEM NO.</b> | <b>Question/s</b>  | <b>LANDBANK's RESPONSE</b>  |
|-----------------|--|---|
| 1.              | Do we need to attach the supporting documents for Ongoing Contracts or the list of it is already sufficient? | Kindly use the template provided in the bidding documents. You may attach supporting documents. |
| 2.              | Do you provide form/template for Secretary's Certificate?  | Please see template in the Bidding Documents.   |

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| <b>Prepared by:</b><br><br>LEONCIO HENRY T. SISON III<br>Assistant Division Chief | <b>Approved By:</b><br><br>ATTY. AUXILADOR AVITUS D. DOFELIZ<br>Head, ICT-BAC Secretariat |
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# Technical Specifications

| <b>Specifications</b>   | <b>Statement of Compliance</b>  |
|---|---|
| <p><b>Supply, Delivery, Installation and Configuration of LANDBANK Service Desk Management System with Three (3) Years Maintenance and Support</b></p> <ol style="list-style-type: none"><li><b>1. Minimum technical specifications and other requirements per attached Revised Terms of Reference (Annexes D-1 to D-26).</b></li><li><b>2. The documentary requirements indicated in the Revised Terms of Reference (Annexes D-24 and D-25) shall be submitted in support of the compliance of the Bid to the technical specifications and other requirements.</b></li></ol> <p>Non-submission of the above documents may result in the post-disqualification of the bidder.</p> | <p><b>Bidders must state below either “Comply” or “Not Comply” against each of the individual parameters of each Specification preferably stating the corresponding performance parameter of the product offered.</b></p> <p>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 applicable laws and issuances.</p> <p><b>Please state here either “Comply” or “Not Comply”</b></p> |

**Conforme:**

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Name of Bidder

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Signature over Printed Name of  
Authorized Representative

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Position



## Checklist of Bidding Documents for Procurement of Goods and Services

The documents for each component should be arranged as per this Checklist. Kindly provide guides or dividers with appropriate labels.

### Eligibility and Technical Component (PDF File)

- *The Eligibility and Technical Component shall contain documents sequentially arranged as follows:*
  - **Eligibility Documents – Class “A”**

#### Legal Eligibility Documents

1. Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages)

#### Technical Eligibility Documents

2. 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; or Original Special Power of Attorney of all members of the joint venture giving full power and authority to its officer to sign the OSS and do acts to represent the Bidder. (sample form - Form No. 7).
3. 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).
4. Statement of the prospective bidder identifying its Single Largest Completed Contract (SLCC) similar to the contract to be bid within the relevant period as provided in the Bidding Documents. The statement shall include all information required in the sample form (Form No. 4).

Financial Eligibility Documents

5. 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.
  6. 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 in lieu of its NFCC computation.
- **Eligibility Documents – Class "B"**
7. Duly signed 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.
  8. For foreign bidders claiming by reason of their country's extension of reciprocal rights to Filipinos, Certification from the relevant government office of their country stating that Filipinos are allowed to participate in government procurement activities for the same item or product.
  9. Certification from the DTI if the Bidder claims preference as a Domestic Bidder.
- **Technical Documents**
10. Bid Security (if in the form of a Surety Bond, submit also a certification issued by the Insurance Commission).
  11. Section VI – Schedule of Requirements with signature of bidder's authorized representative.
  12. **Section VII – Revised Specifications with response on compliance and signature of bidder's authorized representative.**
  13. Duly notarized Omnibus Sworn Statement (OSS) (sample form - Form No.6).

**Note: During the opening of the first bid envelopes (Eligibility and Technical Component), only the above documents will be checked by the BAC if they are all present using a non-discretionary “pass/fail” criterion to determine each bidder’s compliance with the documents required to be submitted for eligibility and the technical requirements.**

- **Other Documents to Support Compliance with Technical Specifications [must be submitted inside the first bid envelope (Eligibility and Technical Component)]**
  1. **Duly filled-out Revised Terms of Reference signed in all pages by the authorized representative/s of the bidder.**
  2. PinkVERIFY Certification on at least six (6) ITIL Processes.
  3. Manufacturer’s authorization (sample form - Form No. 9) or certification confirming that the bidder is authorized to provide the brand being offered and consumables supplied by the manufacturer, including any warranty obligations and after sales support as may be required.
  4. List of at least three (3) completed or on-going projects for the last five (5) years including company name, project name, contact numbers and email addresses with copies of Purchase Orders, Contracts or equivalent documents.
  5. Certification from the manufacturer that the model/product being offered will not have an End of Life Service (EOS) for five (5) years from the date of acquisition.
  6. Curriculum vitae of at least two (2) certified technical engineers with at least three (3) years of technical experience with the proposed solution
  7. ISO 27001 Certification
  8. Application Penetration Testing Result without critical risk findings from 3<sup>rd</sup> party service provider

- **Post-Qualification Documents/Requirements – [The bidder may submit the following documents/requirements within five (5) calendar days after receipt of Notice of Post-Qualification]:**
  1. 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.
  2. Latest Income Tax Return filed manually or through EFPS.
  3. Original copy of Bid Security (if in the form of a Surety Bond, submit also a certification issued by the Insurance Commission).
  4. Original copy of duly notarized Omnibus Sworn Statement (OSS) (sample form - Form No.6).
  5. Duly notarized Secretary's Certificate designating the authorized signatory in the Agreement if the same is other than the bidder's authorized signatory in the bidding (sample form – Form No. 7).

**Financial Component (PDF File)**

- ***The Financial Component shall contain documents sequentially arranged as follows:***
  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).
  3. Duly filled-out Bill of Quantities Forms signed by the Bidder's authorized representative (Annex E).

***Note: The forms attached to the Bidding Documents may be reproduced or reformatted provided the information required in the original forms and other requirements like signatures, if applicable, are complied with in the submittal.***



**SUPPLY, DELIVERY, INSTALLATION AND CONFIGURATION OF LANDBANK SERVICE DESK MANAGEMENT SYSTEM WITH THREE (3) YEARS MAINTENANCE AND SUPPORT**

**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 tech refresh of IT Service Desk 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 must be indexed or labeled accordingly for easy identification and validation.

| REFERENCE                      | REQUIREMENT  | WILL<br>COMP<br>LY?<br>YES/NO | REMARKS |
|--------------------------------|--|-------------------------------|---------|
| <b>1. GENERAL REQUIREMENTS</b> |  |                               |         |
|                                | 1.1 For effective operations and management of IT Service Management, there is a need for an industry-standard ITSM solution. Given the expanse and scope of the project, ITSM solution becomes very critical for IT Service Management and SLA Measurement. Critical aspects that need to be considered are <ul style="list-style-type: none"> <li>a. Incident Management</li> <li>b. Problem Management</li> <li>c. Change Management</li> <li>d. Service Request Management</li> <li>e. Knowledge Management</li> <li>f. Service Catalog</li> </ul> |                               |         |
|                                | 1.2 Must be manageable via a user-friendly, web-based console that can only be accessed by the administrators and technical support agents   |                               |         |

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|  | 1.3 Must have the capability to be flexible, customizable, and configurable according to custom requirements without impacting system core functionalities          |  |  |
|  | 1.4 System must allow creating service categories, product categories, etc.   |  |  |
|  | 1.5 Must have the capability to configure workflows and business rules without any external code (i.e. Codeless)  |  |  |
|  | 1.6 Must provide out-of-the-box (OTB) workflows supporting IT Service Management (ITSM) processes. Must also allow modification of all fields including OTB.        |  |  |
|  | 1.7 Must provide search capabilities for open or closed incidents or service requests   |  |  |
|  | 1.8 Must be accessible via internet using a standard web browser application.   |  |  |
|  | 1.9 The proposed solution must have mobile facility application support (Android & iOS) to monitor, approve and update the request.                                 |  |  |
|  | 1.10 The proposed solution must have built-in capability to automatically route, categorize, and assign records based on configurable business rules and workflows. |  |  |
|  | 1.11 Must be as simple as drag and drop and no coding or programming required for the administrators  |  |  |
|  | 1.12 Must have the capability to configure and maintain staging, development and production environments  |  |  |
|  | 1.13 Must support data separation among access of users per department/group  |  |  |
|  | 1.14 Requests must only be visible if you are part of the end user group or implementing group  |  |  |

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|  | 1.15 Must be able to read, import and share data from other sources   |  |  |
|  | 1.16 Must be able to write, export and share data with other sources  |  |  |
|  | 1.17 Must be able integrate and support email servers using the following protocols: <ul style="list-style-type: none"> <li>● Exchange web services</li> <li>● Google service account</li> <li>● SMTP</li> <li>● IMAP4</li> <li>● POP3</li> </ul> |  |  |
|  | 1.18 Must support Active Directory integration for Single-Sign on.  |  |  |
|  | 1.19 Must allow administrators to define business rules to automate and aid interactions with users. For example, the value entered in one field can determine if another field is required or not.   |  |  |
|  | 1.20 Must support the capability to automatically generate a unique case number for each request  |  |  |
|  | 1.21 Must have the capability to input free text, screen captures, and file attachments for the recording of any requests descriptions and resolution activities  |  |  |
|  | 1.22 Must have the capability to put any requests on hold so time does not count against SLA  |  |  |
|  | 1.23 Must have the capability to view the time remaining until the next Service Level Target on response time (associated with priority or SLA). Must trigger email notification as a reminder.   |  |  |
|  | 1.24 Must have the capability to automate ticket closure at a predetermined number of business days after a ticket enters resolved status.  |  |  |
|  | 1.25 The original equipment manufacturer (OEM) of the proposed solution should be present in the market for at least 10 years.  |  |  |

| 2. USER LICENSES REQUIREMENTS |  |  |  |
|-------------------------------|--|--|--|
|                               | 2.1 The Solution should support a named license or Concurrent licensing model.   |  |  |
|                               | 2.2 Must be able to accommodate fifty (50) concurrent analyst/agent licenses or four hundred fifty (450) named analyst/agent licenses  |  |  |
|                               | 2.3 Access to Self-Service Portal should be unlimited and should NOT consume licenses  |  |  |
|                               | 2.4 Must include the creation of an unlimited number of users who can log incident/request   |  |  |
| 3. SYSTEM REQUIREMENTS        |  |  |  |
|                               | 3.1 Must be deployed on-premise, cloud ready or cloud and supports a virtual machine environment   |  |  |
|                               | 3.2 The proposed solution could be deployed either on Windows or Linux Operating system.   |  |  |
|                               | 3.3 The proposed solution must come as a bundled solution along with database or must support integrations with any Open Database Connectivity (ODBC) compliant data sources |  |  |
|                               | 3.4 Must support integrations with Microsoft Active Directory and any other Lightweight Directory Access Protocol (LDAP) compliant sources                                   |  |  |
|                               | 3.5 Must have the capability to support Secure Sockets Layer (SSL) connection to provide a secure socket layer connection using LDAPs  |  |  |
|                               | 3.6 Must be easy to upgrade, with minimal downtime. Upgrades should not affect/delete or modify existing data and customizations.  |  |  |
|                               | 3.7 Must provide new releases, upgrades, and patches for the tool  |  |  |
|                               | 3.8 The proposed solution must have the capability to generate a license usage report.   |  |  |



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|                                     | 3.9 The end user and the fulfiller must be able to communicate and log notes/comments within the created request   |  |  |
|                                     | 3.10 Must be capable of deploying development, UAT environments without additional licenses cost. The system should be capable of taking database backup along with the attachment files on DR site.   |  |  |
|                                     | 3.11 The solution must have a track record of multiple version releases for the past 3 years.  |  |  |
|                                     | <b>3.12 Server requirement for on-premise deployment must be 3 servers only</b>  |  |  |
|                                     | 3.13 The proposed solution must be cloud ready where an on-premise deployment can be migrated to cloud in the future.  |  |  |
| <b>4. SELF-SERVICE REQUIREMENTS</b> |  |  |  |
|                                     | 4.1 Must provide a customer self-service portal where a customer may access knowledge-based articles, submit requests, and monitor the status of their requests  |  |  |
|                                     | 4.2 Must have a type-ahead feature (i.e. Google like search)   |  |  |
|                                     | 4.3 Must provide an end-user interface through which employees can order standardized goods and services from various groups (e.g. HR, IT, Admin)  |  |  |
|                                     | 4.4 Must provide a self-service portal with company's colors and logos   |  |  |
|                                     | 4.5 Must provide availability of a hot news section for current major problems, such as outages and scheduled downtimes  |  |  |
|                                     | 4.6 Must have the capability to display announcements and messages for alerts such as downtime notices, service for maintenance or upgrades, potential virus threats, and other bulletin type messages that an organization needs to communicate to its employees. |  |  |

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|  | 4.7 Must provide a list of items created by the end user that are open and view its details.  |  |  |
|  | 4.8 Must have the capability to display the top/most popular Service Requests based on the system's usage.  |  |  |
|  | 4.9 Must have the capability to display the top/most popular questions and knowledge articles based on the usage of the system.   |  |  |
|  | 4.10 Must provide the capability for the end users to review and approve or deny service requests and change records from the self-service portal with no license required. |  |  |
|  | 4.11 Can provide a social board workspace where end users can send messages to the team or group or to view everyone's activity.  |  |  |
|  | 4.12 Self-service portal must run on a responsive web-based user interface where pages are sized to display appropriately on a mobile device.                               |  |  |
|  | 4.13 Must have a native app on the google play store or apple app store that users can download and install to access the self-service portal.                              |  |  |
|  | 4.14 Mobile native apps must have the capability to enable biometric authentication login on their mobile devices.  |  |  |
| <b>5. SERVICE CATALOG REQUIREMENTS</b> |   |  |  |
|  | 5.1 Must provide an end-user interface through which employees can order standardized IT goods and services   |  |  |
|  | 5.2 Must provide the capability to search the catalog as well as navigate through it hierarchically   |  |  |
|  | 5.3 Must provide information form for each service. Each service may have its own specific information form.  |  |  |

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|  | 5.4 Users must be able to add, manage, and customize the services through a friendly web interface without coding or scripting.  |  |  |
|  | 5.5 Must have the capability to control subscriptions of request offerings to control which groups of users certain request offerings can be available to.   |  |  |
|  | 5.6 Must have the capability to define the list of actions available for each stage in the request management lifecycle  |  |  |
|  | 5.7 Must provide support for simple and complex approval matrices  |  |  |
|  | 5.8 Can have the capability to show estimated delivery time for each service request item  |  |  |
|  | 5.9 Must have built-in default service catalog offerings which can be customized or used as-is.  |  |  |
| <b>6. SERVICE DESK ADMINISTRATION REQUIREMENTS</b> |  |  |  |
|  | 6.1 Must allow updating of request's status  |  |  |
|  | 6.2 Must allow re-routing of created request to another fulfiller  |  |  |
|  | 6.3 Must allow manual change of approval within the course of the request  |  |  |
|  | 6.4 Must allow editing of description and attachment of the request  |  |  |
|  | 6.5 Must allow admin to manually change status/stage of any request  |  |  |
|  | 6.6 Must not allow the service desk to delete a service request but can cancel a service request at any stage instead to keep the service request in the system. Once cancelled, a service request cannot be edited. Have unique status for cancelled tickets. Searchable and can be re-opened |  |  |

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|                                  | 6.7 Must have a Bulk Update option which allows users to update multiple records for a Search Group at one go.   |  |  |
|                                  | 6.8 Must allow user access management  |  |  |
|                                  | 6.9 Must allow the creation of different user groups with different user access matrices   |  |  |
|                                  | 6.10 Must have capability to import data from current service desk solution for viewing and reporting purposes.  |  |  |
| <b>7. REPORTS AND DASHBOARDS</b> |  |  |  |
|                                  | 7.1 Must have the capability for the users to create their own dashboards (pie charts/bar charts) from any data in the system  |  |  |
|                                  | 7.2 The system must be able to filter and extract reports to the following format: <ul style="list-style-type: none"> <li>● Microsoft Word</li> <li>● Excel</li> <li>● PDF</li> <li>● CSV</li> </ul> |  |  |
|                                  | 7.3 Able to allow changing/ customization of fields and time interval.   |  |  |
|                                  | 7.4 Able to provide reports on standard Key Performance Indicators and turnaround time for each phase of every module  |  |  |
|                                  | 7.5 Provides SLA reports graphs, matrix report, report consideration Group by, Order by, Filters, etc.   |  |  |
|                                  | 7.6 System must be able to determine and generate reports that exceeded Service Level Target and Service Level Agreement   |  |  |
|                                  | 7.7 Private Report features must be available and the visibility must be able to control based on user & Role  |  |  |
|                                  | 7.8 Must have the capability to view out-of-the-box reports or create your own reports based on record type  |  |  |

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|  | 7.9 Must have the capability to save reports publicly or privately with appropriate permissions   |  |  |
|  | 7.10 Must have analytic metrics to see your data graphically, and chart both current data and trends. The analytic charts are flexible and customizable and can be modified as necessary.                         |  |  |
|  | 7.11 Must have the capability to schedule a report to run at specific times. The system can email scheduled reports to one or more users.   |  |  |
|  | 7.12 Custom fields added and configured in the system must be searchable or used as filters on reports, search and dashboards.  |  |  |
| <b>8. INCIDENT MANAGEMENT REQUIREMENTS</b> |   |  |  |
|  | 8.1 Incident records can be classified according to the Service, Category, Service, Impact, Urgency, and source. Priority must be auto-calculated based on the Impact and Urgency selected                        |  |  |
|  | 8.2 Incident records contain State Status information   |  |  |
|  | 8.3 Incident records can be linked to Customer/User Information to allow email notification/update  |  |  |
|  | 8.4 Incident records can be linked to the customer - the name of the person who submitted the incident. The application automatically adds the email address, phone number, and location below the customer name. |  |  |
|  | 8.5 Incident records can be reassigned and routed to another team by manually changing the team and owner of the incident.  |  |  |
|  | 8.6 Predefined Escalation Matrix for each business service must be applied to incidents and whenever required it can be defined dynamically for each Incident while working for Incident                          |  |  |
|  | 8.7 Incident can be linked to another Major Incident where linked incidents can be resolved from the master incident.   |  |  |

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|  | 8.8 Able to search similar related incidents that have been previously logged in the system  |  |  |
|  | 8.9 System must provide the option to match incident records to related problem records and known error records  |  |  |
|  | 8.10 Support for notification and escalation, Business Escalation on tolerance breach, must be able to trigger and update the end user and support   |  |  |
|  | 8.11 Must be able to include additional information, attach subsequent tasks and notes to the main incident  |  |  |
|  | 8.12 Must be able to create a task within incident to take help from other team members  |  |  |
|  | 8.14 Must be able to define Business Hours feature to define the operational calendar for your organization, including daily hours and schedules. Business Hours will be used to calculate the response time (such as escalations) |  |  |
|  | 8.15 System must support Multiple Incident templates, Must be able to define different workflows for each department, each Location, for each type of business service.  |  |  |
|  | 8.16 Must be able to define (State, Status, Priority Matrix, Custom Fields, Teams, Escalation Matrix, Dynamic SLA Flow, Services, Requester/ Customers, Role-based access control on Fields, Dynamic Notification Templates, etc.) |  |  |
|  | 8.17 Must be able to define dynamic teams, Notification templates  |  |  |
|  | 8.18 Auto assigned incident to the support staff, Field Engineers based on pre-defined rules   |  |  |
|  | 8.19 System must support the auto-assignment of Incident, must consider auto-assignment based on services, shifts, Load, Staff Leave, etc.   |  |  |
|  | 8.20 System must provide the option to log the comments or notes (sequentially record diagnostic activities and work done) at each Level of support staff (i.e. L1 to L2 to more   |  |  |

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|  | levels) and must be able to extract it in the report.   |  |  |
|  | 8.21 System must support Incident Hierarchic Escalation. Hierarchic Escalation rules must support based on Severity or Priority. For Ex. Based on Incident Priority the Auto Escalation time to a Higher Level must be different.               |  |  |
|  | 8.22 There must be an option to pin selected incidents which will be included in the agent's watchlist for easier monitoring.   |  |  |
|  | 8.23 For any Incident, SLA must be calculated based on Requester/Customer, Service Category   |  |  |
|  | 8.24 The system must provide the capability to store all of the emails and notes related to the current incident and related tasks as part of the activity history.   |  |  |
|  | 8.25 Facilitate updates on incident resolution progress. Notification could be sent via email, or SMS at each milestone.  |  |  |
|  | 8.26 Support the automated routing (alerting) of Incidents to selected support staff or groups based on multiple parameters e.g. Network team must get tickets for network issues only   load balancing between service level the team members. |  |  |
|  | 8.27 Facilitate flexible report generation based on selected filtering parameters such as location, incident type, priority, escalation, SLA breach and enable reports to be viewed, printed or exported to other file formats                  |  |  |
|  | 8.28 Ability to generate reports on outstanding (unresolved) Incidents for both IT & Facility infrastructure separately.  |  |  |
|  | 8.29 Ability to generate reports on closed Incidents and notification to users of the closure.  |  |  |
|  | 8.30 Facilitate the automatic escalation of Incidents based on pre-defined time intervals or milestones   |  |  |
|  | 8.31 It must support tracking of SLA (service level agreements) to see the time left until the  |  |  |

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|  | next Service Level Target on response time (associated with priority or SLA)  |  |  |
|  | 8.32 Must have the capability to keep track of the total time the incident was worked while open. This total time must not include suspended or frozen state time. The time must be stopped by an individual.   |  |  |
|  | 8.33 Must be able to attach Multiple SLA Metrics, Must be able to adjust the SLA based on Authorized workflow   |  |  |
|  | 8.34 It must provide Customer surveys to measure customer satisfaction with the various departments in your organization.   |  |  |
|  | 8.35 Incident Record Access Control (tool allow access controls to open, modify and close incidents based on pre-established conditions)  |  |  |
|  | 8.36 Restrict the ability to open, modify, cancel and close Incident records to authorized staff only   |  |  |
|  | 8.37 Must have the capability to input free text, screen captures, and file attachments for the recording of incident descriptions and resolution activities  |  |  |
|  | 8.38 Must have the capability to use knowledge and/or support scripts for incident diagnosis and resolution   |  |  |
|  | 8.39 Must have the capability to put incidents on hold so time does not count against SLA   |  |  |
|  | 8.40 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 |  |  |
|  | 8.41 Must have the capability to allow users/support to suspend work on an incident. Incident can be unsuspending or resumed by the same user or support.   |  |  |
|  | 8.42 Must have the capability to quickly create an incident by cloning an existing incident.  |  |  |



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|   | 8.43 Must have the capability to quickly create an incident by using a predefined incident template. Servicedesk must be able to create and customize incident templates.  |  |  |
|   | 8.44 System must display a list of related knowledge, problems, or similar incidents to the service desk user triggered by keywords in the Incident summary field.   |  |  |
| <b>9. PROBLEM MANAGEMENT REQUIREMENTS</b> |  |  |  |
|   | 9.1 Have a predefined out-of-the-box process for problem management that is compliant with best practice frameworks such as Information Technology Infrastructure Library (ITIL). Problem records are separated from incident, request and change request records    |  |  |
|   | 9.2 Problem Record Date and Time, Problem Source, Contact Detail, Symptoms, Action Taken, Reason for Closure and Status must be recorded, classified according to priority and category, to be escalated based on pre-established and manually overridden conditions |  |  |
|   | 9.3 Problem records can be linked to configuration items, Change, Incident, Problem, Knowledge Base  |  |  |
|   | 9.4 Problem records can be created from incident record, must be able to link with one or more incidents   |  |  |
|   | 9.5 Problem record must have option to add Root Cause, Resolutions and Workaround  |  |  |
|   | 9.6 Must display problem workflow clearly and allows customization of the workflow to align to business requirement  |  |  |
|   | 9.7 Must have option to generate the Root cause analysis and work-around task report for each task after problem closure   |  |  |

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|                                | 9.8 Must provide dashboard and search capabilities to proactively identify potential problems.   |  |  |
|                                | 9.9 The system must provide the capability to store all of the emails and notes related to the current problem and related tasks as part of the activity history.  |  |  |
|                                | 9.10 Support the automated routing (alerting) of Problem tickets to selected support staff or groups based on multiple parameters  |  |  |
| <b>10. REQUEST FULFILLMENT</b> |  |  |  |
|                                | 10.1 Must have the capability to maintain a catalog of approved offerings and services for easy end user reference   |  |  |
|                                | 10.2 Must have the capability to display workflow clearly  |  |  |
|                                | 10.3 Must have the capability to allow end users to facilitate and track their own requests, decreasing help desk involvement and wasted man-hours   |  |  |
|                                | 10.4 Must have the capability for the request tasks to be planned ahead of actual request using task templates and request models to save the time of repetitive tasks and requests by automation of tasks |  |  |
|                                | 10.5 Must have the capability for the request tasks to be presented clearly to show the completion of planned tasks against which stage in Request Workflow  |  |  |
|                                | 10.6 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                                     |  |  |
|                                | 10.7 Must have capability to allow users to request more than one item in a single request form.   |  |  |
|                                | 10.8 Must allow users to edit or cancel specific service request. Must also be configurable where service requests cannot be editable or cancelled beyond a certain point.                                 |  |  |

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|   | 10.9 System must be able to calculate the service request delivery time. Total amount of time that a service request is in submitted, active, approved, or waiting for 3rd party status prior to being fulfilled or closed is called the service request delivery time. |  |  |
|   | 10.10 System must have service request waiting time that run if the service request is in the approved, submitted or waiting for customer status.   |  |  |
|   | 10.11 System must have a configurable time to automatically close the service request if there is no further communication after fulfillment.   |  |  |
|   | 10.12 System must restrict closed service requests from opening.  |  |  |
|   | 10.13 System must allow users to save service requests, record and submit it later. No workflow should be initiated for Service Requests in Draft.  |  |  |
|   | 10.14 System must allow users to create a service request on behalf of an external customer.  |  |  |
| <b>11. CHANGE MANAGEMENT REQUIREMENTS</b> |   |  |  |
|   | 11.1 Change request records can be created separate from incident and problem records , changed and deleted , Time and date will be automatically recorded, can be classified according to priority and category , records contain state, status information            |  |  |
|   | 11.2 Change request can be created by using predefined Change Template  |  |  |
|   | 11.3 Template based Dynamic Task & Activity can be created to define change activity, other stakeholders can be able to provide feedback /comments on the activities  |  |  |
|   | 11.4 Must have a Change Approval Board where members can evaluate, approve or deny change requests.   |  |  |
|   | 11.5 Change planning and execution can be built, test and implemented based on the plan   |  |  |

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|  | 11.6 Change request records can be linked to and routed to support employees  |  |  |
|  | 11.7 Allows customization of the workflow to align to business requirement  |  |  |
|  | 11.8 All request must not be visible to the implementing unit unless approved   |  |  |
|  | 11.9 Requests must only be visible if you are part of the end user group or implementing group                          |  |  |
|  | 11.10 Change requester and fulfiller must be able to communicate within the created request                             |  |  |
|  | 11.11 Approver must be allowed to deny any request given the reason   |  |  |
|  | 11.12 Change requester must be allowed to deny or accept the completion of the request                                  |  |  |
|  | 11.13 Change requester must be able to allow end users to provide service feedback after each request                   |  |  |
|  | 11.14 System must be able to support manual notification  |  |  |
|  | 11.15 System must be able to filter and extract reports   |  |  |
|  | 11.16 Must allow for RFCs to be assigned and reassigned to individuals or groups  |  |  |
|  | 11.17 Must support creation of tasks (work processes) that can be assigned to individuals as part of the change process |  |  |
|  | 11.18 Must be capable to attach supporting files/documents  |  |  |
|  | 11.19 Must provide an automated and flexible approval process; supports simple to complex approval models               |  |  |
|  | 11.20 Must provide complete audit trail of all change decisions   |  |  |
|  | 11.21 Must have the capability to facilitate post implementation review   |  |  |

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|  | 11.22 Must provide automatic notification to change stakeholders  |  |  |
|  | 11.23 Must have the capability to look at the history and success rates, and risk profiles of similar past changes  |  |  |
|  | 11.24 Must handle the change process from the point of request through acceptance, scheduling, approval, review, coordination   |  |  |
|  | 11.25 Must display the workflow graph in its implementation approach, so IT audience can see what steps have been taken and which are pending   |  |  |
|  | 11.26 System must have the capability to allow users to assess the risk level of a change request with a risk calculator and surveys  |  |  |
|  | 11.27 Must have the capability to schedule change requests. The change manager should be able to view the lockout period and change window of the related configuration item.                 |  |  |
|  | 11.28 System must-have capability for announcements. Change managers can view the messages sent out to the entire organization.   |  |  |
|  | 11.29 System must have configuration baseline capability within Change requests. Users can view and compare historical changes made to the configuration item as part of the change requests. |  |  |
| <b>12. KNOWLEDGE MANAGEMENT REQUIREMENTS</b> |   |  |  |
|  | 12.1 Must provide a fully integrated Knowledge Management module  |  |  |
|  | 12.2 Must provide Knowledge Management dashboards and reports out-of-box  |  |  |
|  | 12.3 Must use the description field from the ticket to search the knowledge   |  |  |
|  | 12.4 Must auto-populate the resolution field in the ticket from the knowledge article when a solution is found  |  |  |
|  | 12.5 Must support a variety of search methodologies including:  |  |  |

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|  | <ul style="list-style-type: none"> <li>a. Application of the data-segregation security organizational unit constraint to a role to affect the list of records that appear by default.</li> <li>b. Using Saved Searches to list specific knowledge articles a user might need.</li> <li>c. Must have the capability to create an FAQ section based on categories</li> <li>d. Must have the capability to allow user feedback to rate/score content for usefulness related to the inquiry</li> <li>e. Must have the capability to determine the user's profile on what knowledge documents they are allowed to search and view and publish</li> <li>f. Must have the capability to create, draft, update, copy and publish to knowledge base's based on role or access to categories. Publishing to some categories and publishing of some types of documents must be role based as well</li> <li>g. Ability to search knowledge articles from within the incident or problem record</li> </ul> |  |  |
|  | <p>12.6 Must have a defined workflow process for reviewing and approving pending knowledge articles. Must be displayed graphically</p>  |  |  |
|  | <p>12.7 Must be able to make certain fields in the knowledge article template mandatory</p>   |  |  |
|  | <p>12.8 Must be able to control the capability to edit existing knowledge base articles, following based on defined approval workflows and user roles</p>   |  |  |
|  | <p>12.9 Must have the capability to establish expiration dates that drive update alerts to the document owner and control visibility</p>  |  |  |
|  | <p>12.10 Must have capability to set the status of a knowledge article to for review and a task is created in the logged status and the knowledge approval process starts.</p>  |  |  |
|  | <p>12.11 Must have a pre-defined knowledge of article templates such as Documents, Error Message, Issue and Resolution, Q&amp;A and Reference.</p>  |  |  |

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|  | 12.12 Must allow a single knowledge article to contain some content that is visible only to certain consumers  |  |  |
|  | 12.13 Must allow knowledge to be created directly from the incident, problem and known error records   |  |  |
| <b>13. SERVICE LEVEL MANAGEMENT REQUIREMENTS</b> |  |  |  |
|  | 13.1 System must have capability to implement and manage Service Level Agreements  |  |  |
|  | 13.2 System must have capability to implement and manage Operational level agreements  |  |  |
|  | 13.3 Must have capability to link a service level to a specific service and request offering   |  |  |
|  | 13.4 Service Level Agreements must have service level targets to measure performance of the servicedesk. Service level targets must be defined for the following:<br><ul style="list-style-type: none"> <li>a. Response Target for incidents</li> <li>b. Resolution target for incidents</li> </ul> Delivery target for Service Requests |  |  |
|  | 13.5 Must have capability to generate compliance information by aggregating the service level targets for all incidents and service request under a SLA.   |  |  |
|  | 13.6 Must have built-in default dashboards and reports for measuring SLA   |  |  |
|  | 13.7 Must have the capability to create a service with predefined but configurable workflows.  |  |  |
|  | 13.8 Must allow service owners to retire a service that is no longer used.   |  |  |
|  | 13.9 Must be able to define SLA to be used per customer basis, must be able to offer different SLA to different customer or same SLA to multiple customers   |  |  |
|  | 13.10 Must have the capability for the end-users to track the status of their request via web interface  |  |  |
|  | 13.11 Self-Service Approvals - Must have the capability to approve requests, changes and knowledge articles via self-service interface   |  |  |

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|  | 13.12 SLA can be linked to Incident, Service Request, Problem and Change management to monitor and track against tolerance breach, Support for notification and escalation on tolerance breach  |  |  |
|  | 13.13 Must be able to attach Multiple SLA Metrics, Must be able to adjust the SLA based on Authorized workflow  |  |  |
|  | 13.14 Must have the capability to keep track of the total time the incident, request, problem or change was worked while open/in-progress.  |  |  |
|  | 13.15 System must be able to send notifications based on SLA/prioritization escalation triggers.  |  |  |
|  | 13.16 System must be able to generate reports with regards to turn around time and SLA performance  |  |  |
|  | 13.17 Must have the capability to put incidents, service requests, problem and change requests on hold status so time does not count against SLA  |  |  |
| <b>14. SERVICE CONFIGURATION MANAGEMENT REQUIREMENTS</b> |   |  |  |
|  | 14.1 System must be able to support configuration management database feature to store and manage configuration Items. Configuration Items can be IT services, hardware, software, buildings, people and other formal documentation.  |  |  |
|  | 14.2 Configuration management database must have relationships/link to the following ITSM processes: <ul style="list-style-type: none"> <li>a. Incident</li> <li>b. Problem</li> <li>c. Change</li> <li>d. Service Request</li> <li>e. Knowledge</li> <li>f. Service Catalog</li> </ul> |  |  |
|  | 14.3 Must have predefined templates for creating new Configuration Item with default forms and fields   |  |  |
|  | 14.4 System must allow the creation of a new configuration item within the Incident Record.   |  |  |
|  | 14.5 Configuration Items can be decommissioned or disposed by setting the   |  |  |



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|                      | status to 'Retired' and attaching a supporting documentation  |  |  |
|                      | 14.6 Configuration items must have a baselining capability which configuration managers can view and compare all historical changes made to the configuration item.   |  |  |
|                      | 14.7 Must have the capability to create a change lockout period and change window for a configuration item. Change lock should not allow any change requests during this time. The change window is the preferred time to implement a change. This information can be linked and viewed by the change management process. |  |  |
|                      | 14.8 Must have the capability to input a cost item in the configuration item record.  |  |  |
|                      | 14.9 Must have a configuration item map capability to allow users to view the relationship between configuration items, CI outage impact and CI Map Tree. Relationship must include the following: <ul style="list-style-type: none"> <li>a. Dependent on</li> <li>b. Hosted on</li> <li>c. Managed by</li> </ul>         |  |  |
|                      | 14.10 Incidents, problems and changes can be created or linked from Configuration Management  |  |  |
|                      | 14.11 Must have the capability to view a variance report which lists all configuration items that have been updated.  |  |  |
| <b>15. TRAININGS</b> |   |  |  |
|                      | 15.1 The Winning Bidder must be able to provide workshop/skills transfer/tech updates/industry best practices of the proposed solution  |  |  |
|                      | 15.2 The Winning Bidder must provide the necessary training logistics and paraphernalia for the participant's needs without additional cost to the Bank   |  |  |
|                      | 15.3 Training must be available online or in person. Must provide at least two (2) sessions of user training for the representatives of   |  |  |


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|   | various departments/units for at least one (1) day per session   |  |  |
|   | <b>15.4 Must provide ITIL non-certified basic training to create awareness and alignment of LBP resources on the best practices that will be adopted by LBP.</b>   |  |  |
| <b>16. TECHNICAL SUPPORT REQUIREMENTS</b> |  |  |  |
|   | 16.1 Must provide three (3) years maintenance support agreement, including fifty (50) licenses.  |  |  |
|   | 16.2 The vendor must install the latest available and compatible software versions (Windows and Linux) in the proposed solution for three (3) years  |  |  |
|   | 16.3 Must include 8x5 local and remote product technical support for three (3) years. 24x7 Support for Priority 1 issues. (Please see attached SLA)  |  |  |
|   | 16.4 Must include onsite support for three (3) years for priority one (1) issues. LBP SLA on the incident and problem management will be observed. (Please see attached SLA)   |  |  |
|   | 16.5 Support must always be available and accessible on demand as part of the support and maintenance agreement. (Please see attached SLA)   |  |  |
|   | 16.6 Must include post-implementation Optimization Services for Continual Improvement  |  |  |
|   | 16.7 Must include local resources for Technical Account Management and Quarterly system health checks  |  |  |
|   | 16.8 The Winning Bidder must be able to provide the following Post-implementation Services for three (3) years to start upon delivery of the licenses:<br><ol style="list-style-type: none"> <li>1) Standard support</li> <li>2) On-demand support</li> <li>3) Quarterly health checks</li> <li>4) Technical Account Management</li> </ol> |  |  |

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|   | 5) System Optimization Services  |  |  |
| <b>17. DOCUMENTATION</b>  |  |  |  |
|   | <p>17.1 The Winning Bidder must provide documentation on the system operations and must be written in English of durable construction with concise and high-quality presentation to include but not limited to the following:</p> <ol style="list-style-type: none"> <li>1. User Manuals</li> <li>2. Technical / Reference Manuals</li> <li>3. System / Operation Manuals</li> <li>4. Troubleshooting and Installation Guides</li> </ol> <p>All documentation must be available in hard and soft copies; Soft copies must be stored on a compact disk and a USB drive; Soft copy documentation must be in a non-editable format.</p> |  |  |
|   | 17.2 Product must be well-documented on vendor website, and active user communities exist to solve technical problems  |  |  |
| <b>18. OTHER PROVISIONS</b>                                       |  |  |  |
| <b>18.1 These additional provisions are regulatory compliance</b> | 18.1 The Winning Bidder must comply with the requirements in relation to Third Party/Vendor Assessment conducted by the Bank. Must submit [eg. Latest Financial Statement (FS), Business Continuity Plan (BCP) that are related to the Bank, and List of Updated Technical Support (include name, contact numbers and email address).  |  |  |
| <b>18.2 Performance Evaluation</b>                                | <p>18.2.a. The Winning Bidder must comply with the Performance Assessment Report conducted by the proponent unit in relation to Third Party/Vendor Assessment. The Vendor shall be evaluated on an annual basis or as often as necessary using the parameters set forth in the Performance Assessment Report.</p> <p>18.3.b. An adjectival rating of "Poor" shall be a ground for pre-termination of the contract, subject to a 30 calendar day notice.</p>  |  |  |

| 19. QUALIFICATION AND DOCUMENTARY REQUIREMENTS  |  |  |  |
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| QUALIFICATION REQUIREMENTS  | DOCUMENTARY REQUIREMENTS   |  |  |
| <p>The proposed Servicedesk solution must have achieved ITIL 3, and atleast 6 PinkVERIFY certification on the following ITIL processes.</p> <ol style="list-style-type: none"> <li>1. Incident Management</li> <li>2. Problem Management</li> <li>3. Change Management</li> <li>4. Request Management</li> <li>5. Event Management</li> <li>6. Availability Management</li> <li>7. Knowledge Management</li> <li>8. Service Catalog Management</li> <li>9. Deployment Management</li> <li>10. IT Asset Management</li> <li>11. Service Configuration Management</li> <li>12. Monitoring and Alerting</li> </ol> | <p>Proof or documentation in the form of PinkVERIFY Certification on at least 6 ITIL processes listed.</p>   |  |  |
| <p>The bidder must be a certified partner or reseller of the proposed solution</p>  | <p>Manufacturer's Certificate</p>  |  |  |
| <p>The bidder must have completed at least three (3) similar system solution implementation of the proposed solution for the last five (5) years in the Philippines.</p>  | <p>List of three (3) completed or on-going projects for the last five (5) years in the Philippines. Include company name, name of project, contact numbers and email address of vendor's clients supported with copies of Purchase Order, Contracts or equivalent documents.</p> |  |  |
| <p>The original equipment manufacturer (OEM) of the proposed solution should be present in the market for at least ten (10) years and should not have End of Service (EOS)</p>  | <p>Proof or documentation from the manufacturer that the model/product should not have End of Service (EOS) for 5 years from the time of acquisition.</p>  |  |  |

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| for 5 years from the time of acquisition   |  |  |  |
| Members of the Local Project Team of the vendor must have at least three (3) years of technical experience with their proposed solution and must have at least two (2) product certified engineer                            | Curriculum vitae of at least one (1) technical personnel must be provided in the bidding document and Certificate from local engineer                  |  |  |
| The original equipment manufacturer (OEM) should possess the following Audits and Certifications <ul style="list-style-type: none"> <li>• ISO 27001</li> <li>• External/3rd party Application Penetration testing</li> </ul> | ISO 27001 Certification document.<br><br>Application Penetration Testing result without Critical risks findings from a 3rd party service provider.     |  |  |
| <b>20. DELIVERY SCHEDULE AND PAYMENT TERMS</b>   |  |  |  |
| <b>20.1 Delivery</b>   | 20.1 Must be able to deliver the proposed solution and related components within sixty (60) calendar days upon receipt of the Notice to Proceed (NTP). |  |  |
| <b>20.2 Payment Terms</b>  | 20.2 Payment is within sixty (60) calendar days after acceptance of invoice. 50% upon Delivery of the Solution and 50% upon project completion.        |  |  |

Noted/Approved by:

  
**JONES J. BALLESTEROS**  
 Head, DCMD