



Dhanlaxmi Bank Limited
Corporate Office, Naickanal, Thrissur

Request for Proposal

**Information Technology Service Management Solution
(ITSM)**

RFP No: ISG/ RFP/ 2018-19/ 003

7th Feb 2019

RFP Details Summary

RFP No. and date	RFP No: ISG/ RFP/ 2018-19/ 003
Brief Description of the RFP	Information Technology Service Management Solution(ITSM)
Bank’s Address for Communication	Chief Manager – ISG 1 st Floor, Corporate Office Dhanlaxmi Bank Naickanal, Thrissur Kerala - 680001
e-mail for Submission of Tender	ranjith.p@dhanbank.co.in
Contact Details	Ranjith P ISG Department 1 st Floor, Corporate Office Dhanlaxmi Bank Naickanal, Thrissur Kerala - 680001 Ph: +91 487 6617218 e-mail: ranjith.p@dhanbank.co.in
Date of Issue	7 th Feb 2019, 5:00 PM
Last date of submission of any queries, clarifications etc	14 th Feb 2019, 5:00 PM
Last Date of submission of RFP response as soft copy	21 st Feb 2019, 5:00 PM

Disclaimer

The Request for Proposal (RFP) document is not an agreement or an offer by Bank. This RFP is to invite proposals from the applicants who are qualified to submit the bids (referred as “bidders”). The purpose of this RFP is to provide the bidder(s) with information to assist the formulation of their proposals. This RFP does not claim to contain all the information each bidder may require. Each bidder should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in this RFP and where necessary, obtain independent advice.

The information contained in the RFP document is selective and is subject to update, expansion, revision and amendment. Dhanlaxmi Bank does not undertake to provide any Bidder with access to any additional information or to update the information in this RFP or to correct any inaccuracies therein, which may become apparent. Dhanlaxmi Bank reserves the right of discretion to change, modify, add to or alters any or all of the provisions of this RFP and/or the bidding process, without assigning any reasons whatsoever. Such change will be intimated or made accessible to all Bidders. Any information contained in this document will be superseded by any later written information on the same subject made available/accessible to all recipients by Dhanlaxmi Bank.

Dhanlaxmi Bank reserves the right to reject any or all the responses to RFPs / Bids received in response to this RFP at any stage without assigning any reason whatsoever and without being liable for any loss/injury that Bidder might suffer due to such reason. The decision of Dhanlaxmi Bank shall be final, conclusive and binding on all the parties directly or indirectly connected with the bidding process.

Dhanlaxmi Bank intends to build an Information Technology Service Management (ITSM) Solution with the following objectives:

- **Service Level Management.**
- **Track costs, quantities and contracts for hardware and software assets.**
- **Perform Analytics.**

It may be noted that notice regarding corrigenda, addendums, amendments, time-extensions, clarifications, response to bidders’ queries etc., if any to RFP, will not be published through any advertisement in newspapers or any other media. Prospective bidders shall regularly visit Bank’s website for any changes / development in relation to this RFP.

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1. Introduction

Incorporated in November 1927 at Thrissur, Kerala by a group of ambitious entrepreneurs, Dhanlaxmi Bank Ltd, referred as DLB offers comprehensive range of banking & financial services and its extensive nationwide presence has set the stage for an era of unprecedented growth. Dhanlaxmi Bank Ltd is one of the leading Private Banks in India, with more than 700 Service Outlets.

Bank has state of the art Data Centre (DC) hosted at Nextra Data Ltd (Bharthi Data Centre Managed Services) Bangalore and disaster Recovery (DR) site at Thrissur, Kerala. Bank has implemented Flexcube Core Banking Solution (CBS) in all the branches in India. DC and DR is connected through MPLS link.

2. Scope, Coverage of Work & Implementation Plan

2.1 The proposal shall include an end to end solution for supply, installation & commissioning, of IT Service Management Solution covering:

- **IT Service Management**
- **IT Asset Management**
- **IT Project Management**

2.2 The bidder must design high availability and secured infrastructure solution as per industry best practices.

2.3 The bidder is expected to integrate the entire solution within the banks existing set up for e.g., servers, databases, network devices, security devices, directory setup and other applications etc. This list is only indicative & not exhaustive.

2.4 Bidder must complete the implementation and integration of all the requirements/components as per banks objectives and specifications as mentioned in the RFP document.

2.5 Bidder shall provide the post implementation technical support for all the technical issue related to the solution.

2.6 The bidder shall provide 24x7, 365 days support for the period for 5 years. The support during this period will include all the upgrades, updates, patching, releases etc.

2.7 All products updates, upgrades & patches should be provided by the Bidder/Vendor free of cost during warranty and AMC/ATS period.

2.8 The bidder should propose required hardware/software/database etc for hosting the solution.

2.9 Bank Propose to implement the module in a phased manner as under:

SI No	Module	Phase
1	IT Service Management	Phase 1
2	IT Asset Management	Phase 1
3	IT Project Management	Phase 2

Bank shall release separate Purchase Order for each Phase.

3. Instruction to bidders

3.1 The Bidder shall bear all the costs associated with the preparation and submission of their bid.

3.2 Bidder should submit the bid strictly as per RFP failing which bid will be rejected as non-responsive.

3.3 At any time prior to the last Date and Time for submission of bids, the Bank may, for any reason, modify the Bidding Documents through amendments at the sole discretion of the Bank. In order to provide prospective Bidders a reasonable time to take the amendment if any, into account in preparing their bid, the Bank may, at its discretion, extend the deadline for submission of bids.

3.4 Bid shall remain valid for 180 days from last date of submission of bid prescribed by Bank

3.5 An accompanying letter is required with the bid which should be signed by the authorized signatory of the bidder.

3.6 The bidder must stamp and initial all pages indicating unconditional acceptance of all the terms & conditions of RFP and General Conditions of Contract given in the RFP document.

4. Training Services

4.1 The Successful Bidder shall undertake to provide necessary and adequate training to Bank designated officials to enable them to effectively operate the IT Operation Management Solution. The training schedules should be finalized in consultation with Bank. The scope of the training shall cover all aspects of the operation of the ITSM Solution and the participant count would be 8 numbers.

4.2 The user manual stating steps to carry out IT Service Management functions, maintenance etc. and technical documentation involving detailed instruction for operation and maintenance should be delivered by Successful Bidder. The language of all documentation should be English.

5. Bidding Process

A two stage bidding process will be followed. The response to the present tender will be submitted in two parts:

- a) Technical bid
- b) Commercial bid

a) **Technical Bid**

Technical Bid shall contain all the supporting documents regarding eligibility criteria, scope of work, Technical aspects, Compliance statement and Terms & Conditions mentioned in the RFP. Only those bidders confirming compliance to all the Terms & Conditions of RFP document shall be short-listed for commercial discussion.

As part of Technical bid, Bidder should suggest the hardware/software/database etc required for hosting the solution at On Premise.

b) **Commercial Bid**

Commercial bid should be proposed in three models and Module Wise charges – (Service Management, Asset Management & Project Management) should be separately shown.

- 1) On Premise Perpetual
- 2) On Premise Subscription 5 years
- 3) Private/Public Cloud (Cloud should be hosted in India) for 5years.

Prices quoted should be **EXCLUSIVE** of all applicable taxes and applicable taxes would be deducted at source, if any, as per prevailing rates.

6. Modification of bids & Contacting the Bank

6.1. Bids once submitted will be treated as final and no further correspondence will be entertained on this. No bid will be allowed to be modified after the deadline for submission of bids. No bidder shall be allowed to withdraw the bid, if bidder happens to be successful bidder.

6.2. Any effort by a bidder to influence the Bank in evaluation of the bid, bid comparison or contract award decision may result in the rejection of the bidders bid. Bank decision will be final and without prejudice and will be binding on all parties.

6.3. No Bidder shall contact the Bank on any matter relating to its Bid, once after technical evaluation is over.

7. Terms & Conditions of the bidding firms

The bidding firms are not allowed to impose their own terms and conditions to the bid and if submitted will not be considered as forming part of their bids. The bidders are advised to

clearly specify the deviations, in case Terms and Conditions of the contract applicable to this invitation of tender are not acceptable to them.

8. Documentation

The Bidder is required to provide the complete documentation for ITSM which must include but not limited to: System Requirement Specification, Business Requirement Specifications, Installation and Implementation Guide, User Manual, Administration Guide, Hardening Document, System and Application Architecture, Operations Guide and Standard Operating Procedure.

9. Solution Acceptance

The Bank in coordination with the Bidder shall conduct an acceptance test wherein the Bidder has to demonstrate the implementation of the solution as per the requirement of the Bank. The Bidder shall submit detailed reports of the test outcomes to the Bank.

10. Eligibility Criteria

<u>Sl No.</u>	<u>Eligibility Criteria</u>	<u>Recommended Proof</u>
1	<p>The ITSM Solution should have been implemented in at least three Scheduled/Commercial /Public Sector Banks in India.</p> <p>Proposed ITSM Solution should be from a single OEM covering all channels mentioned as part of the scope</p>	<p>Copy of the customer letter and published financial data of the bank Bidder & OEM</p> <p>Self-Declaration as a part of Covering letter</p>
2	<p>The proposed ITSM Solution should be available on following three models.</p> <ol style="list-style-type: none"> 1) On Premise Licenses – Subscription. 2) On Premise Licenses – Perpetual. 3) Private cloud or Public cloud (The Cloud Server and Storage should be in India). 	

3	The bidder or its partner should be a profit earning company for the last 5 years with having minimum turnover of Rs. 5 Crores per year business in India. This must be the individual company turnover and not of any group of companies. The Company should be in sound financial condition as judged by DHANALAXMI BANK for this purpose.	
4	The bidder or its partner should have service, support canters in India to provide 24 x 7 services in consonance with TAT	Details of support Offices and support system is required
5	The bidder should have qualified project management personnel / team to rollout the project.	

11. Bank’s right to Accept or Reject any bid or all bids

The Bank reserves the right to accept or reject any bid and annul the bidding process or even reject all bids at any time prior to award of contract, without thereby incurring any liability to the affected bidder or bidders or without any obligation to inform the affected bier or bidders about the grounds for the Banks action.

12. Evaluation, Award Criteria & Instructions

12.1 The Technical Bid should necessarily contain all Technical details and other terms and conditions of RFP. Proposals not conforming to the specifications may be rejected summarily. Any incomplete or ambiguous terms/conditions will disqualify the offer.

12.2 The Technical Bid / Scope of the Work submitted by the Bidder will be evaluated based on the terms and conditions of the RFP. Detailed technical evaluation will include scrutiny of company profile, technical and functional information of proposed software/service solution, system demonstration of proposed solution, reference calls and site visits.

12.3 The functional and technical specification is in a form of a table as provided in ANNEXURE 1, which contains the required functionality features in the second column. Bidder’s responses against each functionality as detailed therein would be evaluated for the selection. The Bidder may highlight the noteworthy/superior features of their solution and same may be specified as separate annexure.

12.4 To meet DLB's requirements, as spelt out in this Bid Document, the selected Bidder must have the requisite experience and expertise in providing services in the field of

information and communication technology, the technical know-how, and the financial ability that would be required to successfully set-up the required infrastructure and provide the services sought by DLB.

12.5 A screening committee constituted by DLB for the purpose of selection of the successful Bidder, would evaluate Bids.

12.6 The proposals will be evaluated in stages. In the first stage, i.e. Technical Evaluation of the Bidders will be done and in the second stage Indicative commercial bids would be evaluated and commercial negotiation will be conducted for the technically qualified bidders in this stage.

12.7 Each Bidder acknowledges and accepts that DLB may, in its absolute discretion, apply whatever criteria it deems appropriate in the selection of vendor, not limited to those selection criteria set out in this RFP document.

12.8 The Bidders shall be short listed after the evaluation of their Technical Bids and will be informed. Only the short listed bidders will be permitted to participate further process.

12.9 DLB reserves the right to modify / amend the evaluation process at any time during the Bid process, without assigning any reason, whatsoever, and without any requirement of intimating the Bidders of any such change. At any time during the process of Bid evaluation, DLB may seek specific clarifications from any or all Bidders.

12.10 DLB reserves the right to modify the total quantities subject to a variation of $\pm 25\%$ on either side of the projected requirements during the rate contract i.e. five years (5) from the date of award of the contract. The Bidder shall not and hereby waive any or all objections that it might have at the relevant point of time.

12.11 DLB reserves the right to accept or reject in part or full any or all the Bids without assigning any reason whatsoever. Any decision of DLB in this regard shall be final, conclusive and binding on the Bidder.

12.12 DLB reserves the right to re-issue / re-commence the entire bid process in case of any anomaly, irregularity or discrepancy in regard thereof. Any decision of the DLB in this regard shall be final, conclusive and binding on the Bidder.

12.13 Modification to the RFP Document, amendments, time-extension, clarification etc. if any, will be made available as an addendum on the DLB's website and / or emailed to the prospective Bidders.

12.14 The Bidder should confirm in writing its obligation to supply upgraded model of the product in case of technological obsolescence/non-availability of contracted product/model. The supply of upgraded product, subject to the DLB's approval, will be at the same contracted price as the obsolete model.

12.15 Successful Bidder would sign the Contract/SLA and other forms specified in RFP Document with Dhanlaxmi Bank at Thrissur only.

12.16 The Bidder shall bear all costs and expenses for the execution, stamp duty and submission of the contract and agreements. DLB shall not be responsible or liable for reimbursing/compensating these costs and expenses.

12.17 To complete the work at the site within stipulated timeframe, Bidder's employees/workmen may have to visit the site multiple times, at no extra cost to the DLB.

12.18 Quotations contained in the Bids shall remain valid for a period of 180 (180) days from the date of submission of the Bid in response to the RFP.

12.19 Prices quoted should be EXCLUSIVE of all applicable taxes and applicable taxes would be deducted at source, if any, as per prevailing rates.

12.20 The price ("Bid Price") quoted by the Bidder cannot be altered or changed due to escalation on account of any variation due currency exchange rates or cost of material.

12.21 The DLB will not be obliged to meet and have discussions with any Bidder and/ or to entertain any representations in this regard.

12.22 During the period of evaluation, Bidders may be asked to provide more details and explanations about information they have provided in the proposals. Bidders should respond to such requests within the time frame indicated in the letter/e-mail seeking the explanation.

12.23 The DLB's decision in respect to evaluation methodology and short-listing Bidders will be final and no claims whatsoever in this respect will be entertained.

12.24 The Bids received and accepted will be evaluated by the DLB to ascertain the best and lowest bid in the interest of the DLB. However, the DLB does not bind itself to accept any Bid, lowest or otherwise, and reserves the right to reject any or all bids at any point of time prior to the order without assigning any reasons whatsoever.

12.25 Apart from the above, the company profile, past experience and performance track record of the Bidder in the area of the assignment, methodology to be adopted to carry out the assignment, delivery schedule, service support, price, etc. shall be some of the important criteria in selecting the bidder.

12.26 The Bids will be evaluated both on the Technical and Commercial merits and the DLB's decision in this regard shall be binding, final and conclusive.

13. Confidentiality

The bidder shall not, without the written consent of the DLB, disclose the contract or any provision thereof, any specification, or information furnished by or on behalf of the DLB in connection therewith, to any person(s). The bidder shall not, without the prior written consent of the DLB, make use of any document or information except for purposes of performing this agreement.

14. Patent Rights

The bidder/ OEM shall indemnify the Bank against all claims against infringement of license agreement, patent, trademark, or industrial design, intellectual property or copyrights, etc., arising from or consequent to use of Services in whole or part thereof..

15. Warranty

The ITSM should have a comprehensive warranty of THREE years if the solution is on premise. Warranty should cover troubleshooting, removing bugs/errors and enhancement (if required). All upgrades/updates/new version releases will be provided during contract period free of cost. During implementation phase if any upgrades/updates/new version releases comes, it should be implemented free of cost. The vendor shall also ensure the requisite knowledge transfer to the identified staff of the Bank for maintenance of the system subsequent to the complete implementation

Warranty should cover the following for Solution:

- Service support should be available online for Solution based on round the clock 365 days.
- Bank should have facility to log the call directly with Vendor and OEM, if Bank faces any problem.
- All issues should be attended within 2 hours of receipt of complaint; however telephonic support should be made instantly on receiving the complaint. In case problems persist, part/equipment should be replaced within 4 hours of receiving complaint, so that normal job of the Bank may not hamper.
- Warranty would cover updates/maintenance patches/bug fixes (available from the original software vendor) for system software
- Free of cost version upgrade/customization will be done by vendor whenever new version is released.

16. Annual Technical Support (ATS)

ATS will start after completion of warranty period for 3 years. ATS should cover trouble shooting, resolution of reported issues in the running solution, removing bugs/errors (if required). All upgrades / updates / new version releases will be provided during ATS period

free of cost. Vendor will ensure smooth functioning of the package during ATS through on-line/ off-site support on all 7 days. The shortlisted vendor should support the software for at least two years after completion of the warranty.

17. Signing of Contract

The successful bidder(s) shall mandatorily enter into a Service Level Agreement (SLA) and Non-Disclosure Agreement (NDA) with DLB, within 30 days of the award of the tender or within such extended period as may be permitted by the DLB. The letter of acceptance and such other terms and conditions as may be determined by the DLB to be necessary for the due performance of the work in accordance with the Bid and the acceptance thereof, with terms and conditions shall be contained in a Memorandum of Understanding to be signed at the time of execution of the Form of Contract.

18. Payment Terms

18.1 No advance payment will be made on award of the contract.

18.2 Support and AMC payments would be made annually in advance on Production of invoice and delivery of satisfactory services in the previous year.

18.3 Payment for procurement of hardware and licenses would be made on submission of invoices and report of delivery/commissioning of licenses. The warranty, if any for the procured licenses will start after commissioning/installation of hardware and licenses at server end.

18.4 All payments shall be subject to TDS, if any, as per the tax rules at the time of Payment.

18.5 Payments may be withheld in case all the deliverables are not met and will be based on SLA terms.

18.6 All out of pocket expenses, travelling, boarding and lodging expenses for the entire Term of this RFP and subsequent agreement is included in the amounts quoted and the Bidder shall not be entitled to charge any additional costs on account of any items or services or by way of any out of pocket expenses, including travel, boarding and lodging.

18.7 All the payments to the Successful Bidder shall be subject to the performance/ delivery of the Services to the satisfaction of DLB for this purpose.

18.8 Penalties / liquidated damages, if any, shall be deducted from the invoice value.

18.9 Notwithstanding anything contained in this RFP/ the Contract or in any other document(s) under no circumstances DLB shall be liable to the Successful Bidder and/or

its employees/personnel/representatives/agent etc. for direct, indirect, incidental, consequential, special or exemplary damages arising from termination of the Contract.

18.10 DLB shall not have any liability whatsoever in case of any third party claims, demands, suit, actions or other proceedings against the Successful Bidder or any other person engaged by the Successful Bidder in the course of performance of the Service.

18.11 DLB reserves the rights to dispute/deduct payment/withhold payments/further payment due to the Successful Bidder under the Contract, if the Successful Bidder has not performed or rendered the Services in accordance with the provisions of the Contract which the DLB at its sole discretion adjudge.

18.12 Successful Bidder shall permit DLB to hold or deduct the amount from invoices, for non-performance or part performance or failure to discharge obligations under the Contract.

18.13 It is clarified that the any payments of the charges made to and received by authorized Successful Bidder personnel shall be considered as a full discharge of DLB’s obligations for payment under the Agreement.

18.14 Prior to preparing invoice copy and delivery challan before delivering the equipments, the bidder should check, verify and confirm the location address, user name, contact details with our purchase order. Bidder should ensure that proper delivery of equipment address, Name of end user, and contact details are mentioned on the invoice copy / delivery.

AMC Cost

AMC will be payable quarterly in arrears. The TDS, if applicable, will be deducted by the bank at the time of payment of invoices. Bidder should ensure that exchange rate fluctuations, changes in import duty and other taxes should not affect the Rupee (INR) value of commercial Bid over the validity period of the bid and for a period of 5 years.

19. Penalties

19.1 If, the Bidder fails to deliver and/or install any or all of the Licenses/ Software’s mentioned in the Purchase order (PO), Purchaser shall, levy a penalty of a sum equivalent to 0.5% percent per week or part thereof of the value of purchase order subject to maximum of 10% of the purchase order value of the delayed equipment or unperformed services for that particular location. In case of undue delay beyond a period of 15 days unless otherwise waived by the Purchaser, Purchaser at its discretion may consider the delay as termination of the Contract.

19.2 The DLB reserves the right to impose / waive any such penalty.

19.3 The purchaser may without prejudice to its right to affect recovery by any other method, deduct the amount of penalty from any money belonging to the bidder in its hands or which may become due to the Bidder. Any such recovery of penalty shall not in any way relieve the Bidder from any of its obligations to complete the works/services or from any other obligations and liabilities under the Contract.

19.4 Penalty for the failure of service levels are mentioned in the table ‘SERVICE LEVEL EXPECTATIONS’ and will be calculated yearly while Support Payments would be made annually (max 10% of the invoice value)

20. Submission of Bid

Bid shall be submitted in Hard/Soft Copies. The bid should contain following:

1. **Technical Bid.**
2. **Commercial Bid.** Commercial Bid shall be submitted as per the template ANNEXURE-2

Address for Communication:

Chief Manager - ISG
 1st Floor, Corporate Office,
 Dhanalakshmi Buildings
 Dhanlaxmi Bank Limited
 Naickanal, Thrissur,
 Kerala – 680 001

21. Clarifications Regarding RFP

Before bidding, the bidders are requested to carefully examine the RFP Document and the terms and conditions specified therein. In case the bidders require any clarification on this RFP, the query may be sent to e-mail addresses: ranjith.p@dhanbank.co.in or seetha.vimal@dhanbank.co.in or Phone : 0487 6617218

22. Important Dates

<u>Sl no</u>	<u>Particulars</u>	<u>Date and Time</u>
1	Issuance of RFP document by the Bank	7 th Feb 2019, 5:00PM
2	Last date of submission of any queries, clarifications etc.	15 th Feb 2019, 5:00PM
3	Last Date of submission of RFP response as soft copy	21 st Feb 2019, 5:00PM

23. Execution of Agreement

On awarding the contract, the successful bidder and Bank should execute an agreement, which states the responsibilities and obligations of each party with the other, as per DLB’s outsourcing policy. The Bidder should sign and execute this Non-Disclosure Agreement before the execution of this Contract. The contract will be for a period of Five year.

ANNEXURE 1

Sr. No.	Feature	Minimum Mandatory Specifications	Response
1	General	Should have implemented in 3 or more Scheduled/Commercial/Public sector banks in India	
2	General	Product Should be ITIL V2011 Certified on a Minimum of 10 Processes which are related to ITIL Service Management	
3	General	Product have Multi Tenant Architecture	
4	General	Product should be Deployed On a Private cloud or Public cloud in a multi Tenant architecture	
5	General	Product should have the capability to integrate to Active directory thus enabling Single Signon	
6	General	Product should also have the capability of Form Authentication	
7	General	Product should have the capability of providing Named or Concurrent Anlayst/Technician Licensing	
8	General	Product should have Configurable Role Templates	
9	General	Product should provide High Availability and Load balancing Capability	
10	General	Product should be able to Import User data from LDAP	
11	General	Product should be able to Import User data from Excel File	
12	General	Product should provide Endpoint Widgets reporting for Desktops, laptops and Mobile OS like Android and IOS	
13	General	Product should provide Smart Phone (IOS and Android) Native App for raising a Incident or request, Updating /resolving/closing an incident or a request. Customized Profile Dashboards (CEO, CFO, CIO, IT Ops Mgr etc.)	
14	General	Product should have the feature to Create Multiple Legal Entities under the same Instance and Track their customized SLA's separately.	
15	General	Product should be capable of broadcasting through Email, SMS and Widgets across the enterprise users	
16	General	The solution/Application proposed should support Load Balancing features.	
17	General	Product should have the feature to Create Multiple Legal Entities under the same Instance and Track their customized SLA's separately	
18	General	Architecture for efficient Hardware utilization	
19	General	The solution should be able to Import User data from LDAP	

20	General	Product should be able to Import User data from Excel File	
21	General	Product should have the capability of ticket logging, updation and approval using Mobile application	
22	General	Product should be able to integrate among All sub modules so that linking between various sub modules such as Incident , Problem , change and Asset management is possible	
23	General	The Service desk tool must be provided at DC and DR with or without high Availability	
24	General	Product should have the capability to Remote Desktop connection (RDP) to Desktops /Laptops/Servers over the LAN/WAN/ Internet to connect to Mac, Linux, Unix and Windows Machine	
25	General	Product should have the capability of Auto Recording of Sessions during remote connections and linking the recording to the Incident /Service Request ID automatically without manual intervention	
26	General	Product should have the capability to Remote Boot the Endpoint in Safe and Normal mode and reconnect automatically to the session	
27	General	Product should have the capability to Ability to Transfer files To and Fro during a Remote session	
28	General	Product should have features like Gamification *- IT Technician Performance Metrics Measurement (100+) in Real Time resulting in identifying top Performers and rewarding them for the delivery performance	

Service Management

Domain	Requirement	Response
Incident Management	ITSM Solution should be able to provide technologies like Cognitive IT -Operational Intelligence which enables in providing real time Knowledge articles to Agents/Engineers to enable First Call Resolution	
	ITSM Solution should have the capability of Logging/updating Incident through Web portal, Email, SMS, Mobile app, Web Services and Phone	
	ITSM Solution should have the capability of Email Parsing for logging incidents and Service requests.	
	ITSM Solution should have the capability of Configurable incident Log screen and adding Custom fields	
	ITSM Solution should have the capability of Selection of End User Assets while logging the incident option for	

	users	
	ITSM Solution should have the capability of Selection of CI's while logging the incident.	
	ITSM Solution should have the capability for end users to Chat with technician and vice versa. The Entire collaboration of the chat should be stored in the relevant incident.	
	ITSM Solution should have the option to be provided to the end user to escalate incidents incase if user is not satisfied with the way the ticket is handled	
	ITSM Solution should have the capability to allow end users to reopen the resolved incidents	
	ITSM Solution should have the capability for end users to provide feedback on the Transactional incidents which are closed and also should have the capability to create periodical end user surveys	
	ITSM Solution should have the capability for users delegate their role function to other users	
	ITSM Solution should have the capability for Bulk Closure of incidents by Technicians	
	ITSM Solution should have the capability of Bulk Assignment of Incidents to a Team/Individual	
	ITSM Solution should have the capability of Bulk Updation of Ticket Status like Resolved, Pending etc	
	ITSM Solution should provide the capability of providing Ageing Wise Pending Incident Summary	
	ITSM Solution should provide the capability of providing Ageing Wise SLA Visual Display in Workgroup Queue	
	ITSM Solution should provide the capability of providing Categorization and Filtering of Incidents in Workgroup Queue	
	ITSM Solution should provide the capability of providing Context Menus	
	ITSM Solution should provide the capability of auto population of Priority Definition of incidents based on the description of call logged by the end user with an option of overriding or not overriding the auto populated priority for the technician	
	ITSM Solution should provide the capability of auto population of 'Classification' Definition of incidents based on the description of call logged by the end user with an option of overriding or not overriding the auto populated priority for the technician	

ITSM Solution should provide the capability of auto population of 'Category' Definition of incidents based on the description of call logged by the end user with an option of overriding or not overriding the auto populated priority for the technician	
ITSM Solution should provide the capability of auto population of 'Urgency and Impact ' Definition of incidents based on the description of call logged by the end user with an option of overriding or not overriding the auto populated priority for the technician	
ITSM Solution should have the capability of Auto routing of Incidents based on the description of the problem logged by the end user.	
ITSM Solution should have the capability of Intelligently routing of Tickets to the respective technician based on Description of the reported incident, Skill Level of the technician, Availability, workload of the technician.	
ITSM Solution should have the capability of Location Based routing of incidents based on the attributes of the user and description.	
ITSM Solution should have the capability for end users to Log Incidents with a Cc option to inform other End users that an incident has been logged and all further updates on the incident logged would also need to be intimated to them via emails.	
ITSM Solution should have the capability to capture effort estimation using " Start and stop clock" and also have the capability to enter effort manually by keying the minutes spent by the technician on the incident.	
ITSM Solution should have the capability of Adding incidents into Knowledge Base through an approval workflow mechanism	
ITSM Solution should have the capability to provide User Communication templates	
ITSM Solution should have the capability to provide USER Communication from the Incident record who is other than the Caller	
ITSM Solution should have the capability for Creating Parent child Relationship between the incidents	
ITSM Solution should have the capability for Creation of work-orders/Child Tickets	
ITSM Solution should have the ability for Creation of relationship with other modules and vice versa	
ITSM Solution should have the capability for Creation of Custom Fields to be used in the incident	
ITSM Solution should have the capability to manage	



Vendor Incidents	
ITSM Solution should have the capability to enable checklist i.e tasks to be performed before the technician can resolve an incident, re-assign an incident between workgroups	
ITSM Solution should have the capability for the technician to execute scripts remotely on a CI and the output of the scripts should be stored in the incident.	
ITSM Solution should have the capability to Configurable workflow based on classification and category of an incident	
ITSM Solution should have the capability to create Incident Reminders on resolved incidents or in progress incidents	
ITSM Solution should have the capability for creating Incident Templates	
ITSM Solution should support Option to Send Incident Details by SMS based on Priority	
ITSM Solution Should support Alert notification configuration	
ITSM Solution Should support E-mail Parser configuration for configuring Mail 2 Incident	
ITSM Solution should support Personalization of Incident Queues for Analysts/Service Desk Engineers	
ITSM Solution Should support User Leave Notification configuration as part of personalization option of Users	
ITSM Solution Should support Log Incident for User option for Technicians	
ITSM Solution Should support Option for End users to log incident on behalf of other users	
ITSM Solution Should have both Configurable and Standard Reports with Business Intelligence(BI)Reporting	
ITSM Solution Should support Query builder option and configurable Dashboards	
ITSM Solution Should support scheduling of Push Reports	
ITSM Solution should support upto configuration of upto 10 levels of Automatic Escalations to any Technician	
ITSM Solution Should support configuration of Automatic Escalations to any User	
ITSM Solution Should support User Type Configurations (Gold, Silver, VIP etc) with Customized SLA's	
ITSM Solution should have the capability to configure	

SLA Management by Customers	
ITSM Solution should have the configurable Dashboard	
ITSM Solution Should support Scheduled Incidents	
ITSM Solution Should provide Incident Audit logs	
ITSM Solution Should provide Knowledge Management Display for self Help in real-time	
Auto complete assistance for Incident Logging	
ITSM Solution Should support Intelligent Solution Recommendations for Technicians	
ITSM Solution should be capable to execute Service Automation scripts in to auto-remediate and Resolve incidents	
Should have capability to display graphically the SLA elapsed time and remaining time.	
ITSM Solution Should have the capability of Auto Mapping of Closure codes based on Category and Classification and Vice versa	
ITSM Solution Must have the ability to record Email Conversations between the technician and end user is a part of the Incident record	
Should have the capability to configure Operation Level Agreement (OLA) Management between Workgroups	
Should have option to define and monitor Vendor SLA management and Underpinning contracts: Monitor and track SLAs in terms of response and resolution times for vendor SLA calculation.	
ITSM Solution Should have capability to assign calls based Field Engineer Location positioned based Mobile app and GPS	
ITSM Solution Should have configuration option to Govern SLA and should be able to create notification and escalation based % of SLA or Time based SLA upto to 10 levels of escalation should be possible.	
Recurring Auto creation of Incidents at scheduled times	
Users should have option to Chat with technician on incident raised and audit trail of the same should be available	

Asset Discovery

The solution shall be able to function with or without requiring the endpoints to belong to a domain or active directory.
The Solution shall be able to integrate with one or more Active Directory services.
The solution shall have client server architecture with central management and shall cover end points across the country.
The solution shall provide an easy-to-access, user interface to submit, view updates and search solutions.
The Proposed solution must do Network search & automatic Discovery to identify installed/deployed software, hardware, networking components using any one of WMI, Telnet, SSH and SNMP(v,v2, &v3)
The Discovery should have the ability to discover all the Assets based on IP/MAC addresses, SNMP based network devices etc.
The Proposed solution should be Agent base Discovery
The Proposed solution should be Agent-less discovery
The Proposed solution Should support Distributed scan/discovery
The Proposed solution must have Hardware discovery and should capture details like Serial Number, CPU information, RAM, Chip Set, number of CPUs and Cores, Detail information on Network devices, internal & peripheral disk drives, BIOS details, IP/MAC addresses, End Point/Device name, End Point/Device model, Hard Disk details etc
Should be continuously updated for Agents and ability to auto categorize new hardware
Should have Ability to allow End users/ Customers for regular self-declarations on Asset Ownership (Software and hardware) along with accepting allocated Assets.
Should be able to Import/export all the data to a Database or to xls files and Co-relate the data for validity.
Identify assets through static and dynamically discovered data and clean up duplicate data
Provide ability to Identify Assets through Multiple identities, like Serial Number, IP address, Product Type, Ownership, Version number, Etc.
Tool should have ability to Tag Assets in through multiple ways of tagging, e.g. testing devices, BYOD devices, Soft Allocations, Hard Allocations, etc.
Tool should provide ability to Search Assets through multiple ways like, dates, PO, Serial Number, Tag, Bard Code, Managers, SAP ID, etc.
Should provide an ability to assign roles for Localized Asset Management within teams through portal.
Proposed tool should be capable of giving different reports bases on the requirements like we have 3 years refresh period, this tool should be capable of given a report of all laptops which are older than 3 years, cost center, users wise.
User should be able to see what all asset they have on their name (this included corporate machine and test machine)

During user exit process user should be able to Reassign all the assets except Corporate machine to his/ her Manager / team member and carry a printout of the asset on this name and IT will clear the asset and move the asset back to stores (stock)
The tool should be a complete tool from start of procurement of asset, asset tagging, bonding, upgrade, assigned to user, stock of laptops / workstations / servers in stores and retirement model – This should be a completely based on ITIL framework.
The tool should have the capability to include a range of all kinds of devices in the market with different operating systems. (E.g. Servers, Storages, Netscalers, Network devices, Wireless Access points, phones, etc.) - Yes
The software should be IT audit Compliant.
It should be capable of using AD/LDAP service for Authentication and identification of users, admins, etc. Should be capable of identifying multiple attributes from AD like, users, name, role, location, phone number, Cost centers, etc.
Tool should be able to integrate in Employee’s exit process through Automation of approvals, handovers, etc. –
Tool should have ability to Management NON IT assets as well.
Should have ability to create unlimited asset categories. E.g fixed asset, consumables, accessories and software
Asset lifecycle management: should be able to handle the complete life cycle of an asset i.e. all stages from procurement to disposal
Should have ability to allocate, de-allocate, return, reallocate to Single user and multiple users and projects, Vendors, etc.
ITAM Tool should have the ability to do Bulk allocation
Repair & maintenance history: Templates available for tracking maintenance of assets and records with complete history information.
Should have ability to support Disposal of Asset process
Should be able to maintain records of their entire service history for inventory. Track and report these separately. Should have ability to edit and extend, shorten the support contract, warranty support on bulk and individual assets.
Audit trails: Provide flexible way to track changes to data, comments, and attributes for almost every asset. Save and provide complete audit trail of Asset Movement –
Ability to get support and contracts to be tagged with assets and tracked separately. E.g purchase, lease, rental, warranty, rate, master, blanket and user-defined contracts.
Asset depreciation calculation: Provides the ability to calculate and display any asset depreciation methods like straight-line, down value method and custom formulas.
Ability to do dynamic software license allocations, reconciliation of licenses, support contracts, etc. Track and report Blacklisted software.
Ability to detect unauthorized software installation through Agent will be a big plus.

Ability to create Gate pass creation and approvals for asset movement between stores/floors and Repair center, users, buildings, cities, etc.
Tool should be able to generate either Barcode or QR code Generation Support with option of Customer to choose
Support of Mobile App based QR Scanning
\$ and INR Value tracking reports for the values of assets based on the cost centers, users, owners, teams, locations, etc.
The Proposed solution must have Software discovery and should include detection of all application and software programs including in house developed applications/programs, virtualized applications, OS versions and Service Pack information, patch information, services running on the Device etc
The proposed solution should have Asset Inventory and life cycle management for assets both IT (IP and Non-IP) & Non IT in DC Bengaluru and also able to extend across the bank infrastructure including the branches
The Proposed solution should do discovery of storage devices
Grouping of assets based on type
Addition / deletion of IT Assets, Asset properties/attributes
User wise utilization and association of IT Assets
Tool should support both Import Assets from CSV , Excel etc formats, for adding or updating Assets to the inventory
ITAM Solution should facilitate Vendor and Asset association along with details like contracts, SLA etc
Model/Template for inheriting IT Asset properties/attributes & ability to modify model/templates to add additional properties/ attributes to Assets
ITAM Tool Should support configuration of Unlimited number of Asset Types and fields
ITAM tool should support configuration of Role based security and access to Asset module
Discovered and owned Asset reconciliation through Physical Verification of Assets
ITAM should support Reconciliation of Assets with or Without Approval
Search facility based on different search criteria
The Proposed solution Should support licensing management for all major Principals like Oracle, SAP, IBM, and Microsoft etc. The licensing management should also support all other major Principals not explicitly specified here.
The functionalities provided by the solution should support discovery/management across multiple operating systems like Windows, Mac, UNIX, Linux, Mainframe OS, Virtualized environments etc, multiple databases like Oracle, DB2, SQL, MySQL, Hypervisors etc.
The solution shall track/discover all asset deployment, hardware/Software inventory, their lifecycle information using single console/system.
The solution shall support creation of unlimited asset category.
The solution shall be able to scan and inventories all workstations across the entire organization, servers, printers, network devices etc. and shall provide

complete information about assets along with hardware and software information.
The solution shall mandatorily have the capability of deploying agent through active Directory GPO, scripts, manual download and installation by administrators. (Any other modes please specify)
The solution shall provide hardware inventory reports about workstations in the Organization’s infrastructure such as OS details, CPU details, network information, hard disk details, and RAM slots etc.
The solution shall illustrate the variance in attributes for both hardware and software assets through asset discovery.
The Solution shall provide the availability of Remote Desktop connection (RDP) from the tool to Desktops /Laptops/Servers over the LAN/WAN/ Internet.
The Solution shall manage complete life cycle of an asset i.e. all stages from procurement to disposal.
The Solution shall support Asset deletion capabilities enabled with workflow
The Solution shall allow multiple Assets to be imported or exported in one go using an excel spreadsheet.
The Solution shall have capability for User allocation/de-allocation of assets, user details are to auto-populated via Active Directory. The Solution shall support following allocation types at minimum
Asset allocation to single user
Asset allocation to multiple user
Asset allocation to project
Asset allocation to customer
Asset allocation to location
Bulk Allocation of Assets
Asset Return & Re-Allocation process
The Solution shall be capable of sending Notification to end User on Allocation of Assets and Online Acknowledgement of assets from End Users.
The Solution shall have templates for tracking maintenance of assets and records with complete history information to provide Repair & maintenance history.
The Solution shall allow disabling un-used assets and maintaining records of their entire service history for inventory.
The Solution shall allow maintaining AMC/warranty information with alerting.
The Solution shall support Online Patch Management for Microsoft Products.
The Solution shall provide flexible way to track changes to data, comments, and attributes for all assets.
The Solution shall provide Asset depreciation calculation ability to calculate and display any of two asset depreciation methods including straight-line, down value method by Category or by using custom formulae by Category.
The Solution shall allow Creation of Multiple hierarchy of Stores or Branches or Regional offices/Head office
The Solution shall allow Gate pass creation and approvals for asset movement

between stores/floors and Repair centre.
The Solution shall allow Bar code and QR code generation.
The Solution shall support email alerts on any observed Hardware variance, Software variance in the system and shall notify respective administrator or manager via email alert. Like RAM is changed.
The Solution shall have provision for Software delivery management for MSI Packages.
The Solution shall provide support for alerting on asset thresholds for asset stores: Alerts are triggered when there is a violation in the defined thresholds.
The Solution shall provide contract management support for purchase, lease, rental, warranty, rate, master, blanket and user-defined contracts with Alerting by Mail.
The Solution shall provide Software license management capable of managing software assets and licenses, with a single solution for discovering software on the network, recording and validating license entitlements, and creating a dynamic best-fit reconciliation.
The Solution shall allow Software license metering to understand the software license compliance and the use of unauthorized software in the organization and helps to act proactively to curb illegal usage and problems associated with it.
The Solution shall allow Software compliance monitoring to understand the software license compliance and use of unauthorized software in the organization and generates reports, tracks all under-licensed, over-licensed and compliant software.
The Solution shall Sends alerts when an unauthorized software installation is detected, ensuring software compliance on an on-going basis.
The Solution shall allow Software usage metering to understand the usage of software licenses and helps to understand the software usage by users.
The Solution shall allow Remote Uninstallation from console/variance screen.
The Solution shall provide software inventory report details about software installed in workstations across the network.
The solution shall keep up-to-date software information and helps us in saving time during software audit process.
The solution shall help to understand the usage of software licenses and helps to understand the software usage by users.
The Solution shall have application control capability to Whitelist and Blacklist software or applications. It shall control the usage of un-authorized application. End users shall not be able to install/Execute any software, both 'on' and 'off' the network. (Even if the end user had local admin rights) unless it is white listed by the Software Administrator.
The Solution shall allow Profile Base lining of Software by Asset, Department, Location, IP address
The Solution shall allow integration with external purchasing and order systems via web services.

<p>The Solution shall provide support for Endpoint/Desktop Compliance for various parameters which helps organization’s to track the security compliances at endpoints on Windows OS. The solution shall monitor parameters like antivirus updates with the latest signature file, group policy deployment, open shares, Bluetooth enablement, and USB enablement etc. and provide a dashboard to report the compliance level against the monitored parameters.</p>
<p>To avoid any security breaches, which could lead to data theft and data loss, The Solution shall provide built-in local administrator account control module to helps organization dynamically create local admin passwords for Windows OS. The system shall generate passwords and stores them in an encrypted format in the password vault. Local admin passwords shall be validated regularly and reset at predefined times to maintain the integrity of the password vault.</p>
<p>The Solution shall be able to provide dashboard of graphical representation as well as tabular form of all the assets based on category, location, aging of the asset, customer which can be further level down to the incident record ID. Other reports shall be available are hardware variance, software variance, asset variance, depreciation report, software compliance report, software licenses report etc.</p>
<p>The solution shall have provision to generate reports on various parameters such as: (Not limited to)</p>
<p>a. IP address</p>
<p>b. Location</p>
<p>c. Purchase order wise</p>
<p>d. Depreciation details</p>
<p>e. Particular Software</p>
<p>f. Compliance/ variance with the available licenses</p>
<p>g. Operating system</p>
<p>h. Warranty /AMC etc</p>
<p>The solution shall have Advance reporting capability to create or generate report/dashboards based on chosen parameters/fields and generate adhoc reports based on the needs of the Organization.</p>
<p>All the workflows shall compliant with ITIL V2011 Standards</p>
<p>ITAM Tool Should support Patch Management Windows ITAM tool should support approval patches and only approve patches to be deployed ITAM Tool should support grouping of Windows Assets and should provide ability to deploy patches as per the groups defined ITAM Should support configuration of times based download of patches ITAM Tool should have the capability to create Approval workflows for Asset Movement ITAM Tool Should have the capability to create approval workflow for Addition or Deletion of Assets ITAM tool should provide capability to Physical Asset Verification using Excel upload of Data or through update of data through mobile app and</p>

provide Variance report
Desirable Features:
ITAM should be able create policies to white list and Blacklist software and block all blacklist or should provide capability to define blacklist software with ability to block and notify Asset Admin of blacklisted/Unauthorized Software Installation.
The policies defined to block software should use original software file name.
ITAM Should have the capability to check the policy compliance of the computing devices in an organization network. The policies should have both Static and Dynamic parameters for configuration. Static can be include viz. Patch compliance, Anti-virus update compliance, USB port status etc. Dynamic policies viz registry entries, value of WMI class, VB scripts, Power Shell, Batch Command and so on.
ITAM Tool should have capability to ensure the local admin password of all Windows systems are not common and it should keep changing at periodic intervals

Project Management

S No	Requirement	Response
1	Ability to create macro trend reports across projects	
2	Ability to designate low priority projects that do not need to follow timeline	
3	Ability to drag and drop tasks/subtasks scheduling to allow analysis, "what if" scenarios	
4	Ability to drag and drop WBS scheduling to allow analysis, "what if" scenarios	
5	Ability to easily modify/undo, re-baseline WBS and/or project resources	
6	Ability to establish team assignments based on dates and time allotments to get work done	
7	Ability to link projects to a service, product or asset	
8	Ability to link task/subtask schedule dependencies	
9	Ability to link schedule dependencies	
10	Ability to manage content around project risk, changes, issues and stakeholder communication and decisions	
11	Ability to manage milestones	
12	Ability to navigate quickly to project WBS (work breakdown structure), change, risk, issues and communications content	
13	Ability to rebase line financials without losing initial budget data	
14	Ability to run historical reports across staff, resources, projects and portfolios	

15	Ability to see impacts and dependencies of projects across the portfolio of product/services/assets	
16	Ability to support requesting and managing project inventory	
17	Ability to track service orders placed with vendors	
18	Ability to track workflow as information is updated by different sources	
19	Ability to use sub-task and "To do list" levels in WBS	
20	Custom reports with detail, flags, notes, risks, issues	
21	Dashboard for project status for time, budget and scope	
22	Ease of exporting and printing time tracking information to validate contractor time data and invoices	
23	Financial view able to capture and lock-in initial budget	
24	Financial view includes both external direct costs and internal labor costs	
25	Generates online report showing current projects, total estimated hours and priorities of open projects by department and overall	
26	No limitations to size of WBS	
27	Provide collapsible tasks and subtasks	
28	Provides Gantt, Grid and Calendar views	
29	Provides Project Management including milestones, tasks, subtask with duration and dependencies to keep projects organized and on track	
30	Provides seamless integration with Google Calendar	
31	Reports with original baseline and all rebase lines	
32	Simplicity in creating, updating and choosing WBS templates for various project types	
33	TCO (total cost of ownership) for a project rolls up to TCO for product/service/asset and can be viewed for any given amount of time	

ANNEXURE-2

The commercial should be broken up for each module (Service Management, Asset Discovery & Project Management) for all three options.

Option 1

On Premise Licenses – Subscription Model					
Product Description	License Mode	Unit of License	Quantity	Unit Price INR	Amount - INR per annum

Please share cost for 5years on Subscription Model

Option 2

On Premise Licenses – Perpetual Model					
Product Description	License Mode	Unit of License	Quantity	Unit Price INR	Amount - INR

Option 3

Cloud – Subscription Model					
Product Description	License Mode	Unit of License	Quantity	Unit Price INR	Amount - INR per annum

Please share cost for 5years