**IT Requirements**

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| **Requirement** | **Answer** |
|  **System Access** |
| Is the solution accessible using secure URL? Or the solution accessible via VPN? And would it be preferred? |   |
| Does the solution require any software/plugin to be installed on the user’s PC? |   |
| What operating systems and web browsers does the solution support? |   |
| Other requirements for accessing the solution? |   |
|  **Data Protection** |
| Does your company use secure coding practices? |   |
| Will you be outsourcing any activities in the delivery? |   |
| Does your system support Single Sign-On? |   |
| Does the solution provide role based access control? |   |
| Provide an overview of the granular access control capabilities of the system. |   |
| Describe the concurrency of the software architecture i.e. single or multiteneted? |   |
| Do all users have a unique login to the system? |   |

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|  **User Account Management & Role Based Access** |
| Does the system enable administrators to create/update/delete/disable user accounts via the web front-end? If not, is this performed by the vendor? |   |
| Does the solution provide role based access control? i.e. Users can be setup as Administrators/Regular users |   |
| Will the vendor setup the administrator role? Which business user will obtain this access? |   |
| Can users be setup as Administrators/Normal users? |   |
| Can users be setup as groups (i.e. agent)? |   |
|  **Security** |
| Is there a regular regime of penetration testing? |   |
| Please describe the frequency and provide a copy of the latest report. |   |
| Are there regular vulnerability tests conducted? |  |
| Does the system support the password policy below? |  |
| * Must be at least 8 characters in length
 |  |
| * Must have at least one uppercase, lowercase, numeric, and non-alpha numeric character (e.g. #$!,)
 |  |
| * Must not contain your username
 |  |
| * Must not contain more than 3 repeating characters (e.g. AAA)
 |  |
|  **Support** |
| Is the solution supported 24x7 or during business hours only? |   |
| Can technical support be contacted via a phone number, email or the website? |   |
| What level of support is covered by the contract at no extra cost? |   |
| Where is the support team located? Any time zone difference? |   |
| What is the escalation process? |   |
|  **Availability** |
| Is the system backed up daily (routinely)? |   |
| Does the system provide high availability without solution disruption? |   |
| Does the system have a disaster recovery alternative?  |   |
| How long will it take switch over to the DR system? |   |
| Do we as a client need to do anything to use the DR system? |  |
| Does the system have data archiving? |  |
| How long will the data be kept for? |  |
| **Hosting** |
| Where is the system hosted? |  |
| Do you have high availability architecture? |  |
| Can you protect our data sovereignty?  |   |
|  **Reports** |
| What type of reports can the solution provide? |   |
| How will the reports be delivered? |   |
| What is the format of the report(s)? |   |
|  **Upgrades** |
| What is your process for planning and notifying of system upgrades?  |   |
| How often do upgrades take place? |  |
|  **Defect Management** |
| Is there a support site to allow our organisation to log defects?  |  |
| If not, how will defects be logged? |  |

**Functionality Requirements**

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| **Requirement** | **Can you meet this?** | **Provide a brief explanation of the proposed solution** |
| Australian owned |  |  |
| Single source of truth for all knowledge, capable of serving multichannel knowledge  |   |   |
| Full ownership of intellectual property |   |   |
| Easy to implement and manage by the business (without the need for IT) |   |   |
| Tablet compatible  |   |   |
| Fully configurable by the business  |   |   |
| Upgrade to future versions at no additional cost |   |   |
| Central point to share, file and retrieve all announcements i.e. emails, product updates etc  |   |   |
| Ability to implement in weeks with fixed cost contract |   |   |
| Easy to access 24/7 service and help desk |   |   |
| On the cloud for remote access and disaster recovery |   |   |
| Easy process for contact centre to manage document updates |   |   |
| Quick search for accurate answers (not documents) – search is required to be intuitive and for most popular searches to be displayed. |   |   |
| Ability to test/quiz agents and managers on any topic |   |   |
| Reporting on the test/quiz results by consultants - by topic and by team |   |   |
| Process guidance/work instruction feature with the ability to go directly to single steps and link repeated knowledge |   |   |
| Ability to provide feedback on all knowledge and manage the feedback process |   |   |
| Ability for users to rate knowledge articles to encourage continuous improvement  |   |   |
| Ability to report usage by consultants, topic and team |   |   |
| Robust process guidance with easy navigation between steps  |   |   |
| A function to replace emails to ensure the agent to be kept up to date at all times  |   |   |
| The ability for individuals to save favourites for most frequently used searches |   |   |
| Workflow process to enable control over the authoring, editing, reviewing, approval and publishing of knowledge |   |   |
| Version control system which has the ability to reinstate previous versions |   |   |
| A feature which simplifies complex policies or procedures  |   |   |
| People profile feature  |   |   |
| Ability for knowledge access to be restricted by role and department  |   |   |
| Reporting available for managers to access on demand |   |   |
| A system which provides a multi-channel knowledge solution |   |   |
| Finally, can your system deliver knowledge directly to our clients through our website?  |   |   |