

	<b>TENDER SCOPE OF WORK</b> <b>Group Information Technology</b>	<b>Template Identifier</b>	240-IT042	<b>Rev</b>	1	
		<b>Effective Date</b>	April 2023			
		<b>Review Date</b>	April 2028			

<b>Description of Request</b>	Work Force Management Tool replacement project
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## 1. High level background

The current Workforce Management (WFM) Tool (Totalview) is used to forecast workload, schedule contact centre agents and then to monitor their performance. This enables the business to optimize available resources, increase service levels and ensure service excellence while achieving better cost management. The current WFM Tool (Totalview) was implemented in 2001 and the last upgrade was done in 2019. The contract expires on 13 December 2021 and there is an NT requirement to test the market. The business (GIT) owns the licenses as perpetual so what expires is the support and maintenance of the system. We can however still use it.

## 2. Scope of work/Business requirements

### 2.1. Provide detailed description and volumes of the product/service requested:

#### Gatekeepers:

Gatekeepers
1. Tenderer does have prior or past experience in implementation of WFM Tool and if the tool is operational in an active production environment. Tenderer to provide evidence to that effect, e.g., letter of reference from one of their clients, etc.

**Key Requirements:**

ID	Type	Criterion	Functional Requirement	Requirement description
1	Key Requirements	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p>	Data Location and Cross-Border data flows: Data location – data	Data to be hosted within borders of South Africa OR /European Union

**Functional requirements:**

ID	Type	Criterion	Functional Requirement	Requirement description
1	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to easily modify and update forecasts with new data
2	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to create various forecast profiles or scenarios based on: <ul style="list-style-type: none"> <li>• Number of calls</li> <li>• Organisational unit</li> <li>• Season</li> <li>• Geographic location</li> <li>• Etc.</li> </ul>
3	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to perform workload forecast from historical data and past actions from various sources System should cater for import or access to data including: I.e excel files, MS SharePoint (web) etc.
4	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to identify outliers in historical data / forecasts. This will enable the calculation of more accurate forecasts.

5	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to select and trigger a specific or multiple profiles applicable to the workforce or geographic location etc.
6	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to automatically identify trends and seasonal patterns from historical data
7	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to apply these trends and patterns to the forecasts
8	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to develop profiles/forecasts templates and reuse these templates for certain situations i.e. snow, Rainy season etc.
9	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to generate graphs for visually representing historical data and trends, forecasts etc.
10	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to record changes to forecasts. Previous data/values, why and who changed them.
11	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Forecasting should have the ability to handle situations in historical data where there are gaps or not much data. The use of Artificial Intelligence (AI) should be used.
12	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	The forecasting tool should be easy to use Graphical user interface (GUI) and be user configurable
13	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to use or export the forecasting scenarios or profiles to the workforce capacity planning modules

14	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to include various levels (agents, supervisors, managers etc.) of resource utilisation in forecasts. Ability to calculate how many FTE (Full Time Equivalent) is required. Agent level is imperative.
15	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Forecasting resolutions should be dynamic and easily configurable and include amongst others: <ul style="list-style-type: none"> <li>• Half hourly</li> <li>• Hourly</li> <li>• Daily</li> <li>• Weekly</li> <li>• Monthly</li> <li>• Quarterly</li> <li>• Yearly</li> <li>• etc.</li> </ul>
16	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Forecast should be able to span large or wide periods i.e. 1 year- 10 years
17	Meeting the Conceptual Scope of Work	The creation of demand forecasts that take into account previous actions and historical data	Work Force Management Forecasting	Ability to provide an effectiveness measure of each forecast. How accurate was the forecast. Also provide the ability to compare forecasts
18	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to upload data, forecasts, scenarios etc. from the forecasting modules and other data sources into the planning module
19	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to visually see workforce resources against the demand. This could be based on skills, location, language, availability etc.
20	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The interface should allow you to support different resources with different skill sets and different demands that require different skills

21	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide the ability to automatically and dynamically adjust visible variances in capacity vs demand using resources according to the business policy. This can include overtime, use of contractors etc. The business policies should be configurable in the system.
22	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The planning module Graphical user interface should be easy to use and configure. It should provide an easy interface to find all objects i.e. forecasts, resources, periods etc. It should be an intuitive, time-based graphical layout that will allow one to create and manage work plans.
23	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide the ability to create multiple plans (scenarios).
24	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Solution should be able to automatically provide an indication where there are resource shortages or surpluses
25	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to develop "what if" scenarios
26	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to create resource profiles indicating attributes like: <ul style="list-style-type: none"> <li>• Skills</li> <li>• Language</li> <li>• Location etc.</li> </ul>
27	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The ability to access the resource profiles in order to create the "what if" scenarios

28	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide a resource calendar. The calendar should be editable and allow the management of shifts across various time periods and resources.
29	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide the capability to easily view and manage the availability of the workforce. This includes absences, leave etc.
30	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to perform a comparison of scenarios. This should provide the ability to include various attributes in scenarios to compare ie: <ul style="list-style-type: none"> <li>• Cost</li> <li>• Response times</li> <li>• etc.</li> </ul>
31	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to dynamically change the expected demand based on real time data from the scheduling system.
32	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide the capability to easily generate graphs of workforce utilisation. To also include workload percentage allocations etc.
33	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to provide an automatic balancing of the available capacity between different workloads. This will be aided by use of Artificial Intelligence (AI).
34	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Provide the ability to manage external resources /agents. This will be helpful when using an outsourced resource model to compliment the current resources. - Define the capacity per resource, time,

				and skill etc. - The system should recommend the optimal usage level based on the external resource's availability, cost etc.
35	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to use the data from the system to generate training requirements. The data will provide information like: • What skills are required • What language capacity is required • etc.
36	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should provide tools for leave management. Currently use (Time off Manager) leave planner. Can indicate leave limits. Determine agents per shift.
37	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should be able to handle changes during the planning period. The changes can be related to: • Skills • Availability • etc.
38	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to determine the most optimal resource staffing level for each Unit. • based on turnover • Retirements • etc.
39	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	The solution should allow plans to be generated using yearly, quarterly, monthly, weekly, daily, hourly and half hourly resolutions.
40	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Ability to export a plan or scenario to i.e. spreadsheet. This should include the use of exporting filters for i.e. resources, allocations etc.

41	Meeting the Conceptual Scope of Work	Create a plan of resources (i.e. agents, agent availability, skill, location, shifts etc.) based on the forecast to meet the expected demand and Service levels.	Workforce Management Planning	Planning should be catered in the solution to be able to span large / wide periods i.e. 1 year- 10 years
42	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to cater for shifts that span multiple days. This is when a shift starts in one day and extends into another day.
43	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should allow you to represent the current organisational hierarchy (i.e. the Eskom business structure/locations etc.) and allow future changes to be easily configurable.
44	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	This includes sections like Inbound and outbound etc at a lower level.
45	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Provide an easy to use demand analysis-modelling tool to be able to source and model the data.
46	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to define shift patterns in order to assign shifts. Employ the use of various rotating shift patterns. Each shift pattern will allow the definition of: 1. Period i.e. No of days 2. How many resources 3. Off days 4. etc. and the ability to automatically shift the rotation as well as make manual changes to it.
47	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should provide the ability to effectively manage all available resources.

48	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability for include various information in shifts: • Comment • break time • Lunch • Different activities • etc.
49	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to allow a resource to work on multiple shifts in a day. This should be easily configurable.
50	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should allow alerts to be generated for any exceptions while configuring the shift status ie compliance with the organisational policy and with regulation. Including: not complying with any company policy or rules.
51	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to assign a status indicator to be configurable for each shift.
52	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to configure shift types with different colours or icons etc. to easily identify the shift.
53	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to add one or more overtime intervals per day. Configurable according to business rules. Working hours per agent etc.
54	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should highlight conflicts in the employee shifts i.e. because of added overtime etc.
55	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should have controls and alerts to check against company rules when adding overtime.

56	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability of the system to publish the shift roster so that the resources can view. This can include be via the agent interface module, mobile app etc.
57	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should be able to provide an analysis or report of the coverage i.e. <ul style="list-style-type: none"> <li>• Total capacity shortage and the total extra capacity.</li> <li>• Graph of coverage in various time resolutions</li> </ul>
58	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system should allow the definition and configuration of business rules, environmental policy or contract specific information applicable at different levels in the organisation <ul style="list-style-type: none"> <li>• Maximum working hours</li> <li>• Minimum time between shifts</li> <li>• Days off per week</li> <li>• Minimum rest time</li> <li>• Maximum overtime</li> <li>• restricted duty rules (returning from sick leave)</li> <li>• etc.</li> </ul>
59	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to develop or easily configure new business rules. Vendor to indicate how.
60	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability for the system to auto calculate / aggregate the daily hours, weekly hours etc...
61	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability for the shift planner to determine Restricted Duty (i.e. when employee comes back from extended sick leave) shifts. Maybe agent needs to be relocated to a less stressful environment. Possibly a alert/flag.

62	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system must have the ability to configure various non-availabilities and then show these non-availabilities (activity codes): • Annual Leave • Training • Sick Leave • etc.
63	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system must easily allow the modification of the non-availabilities / activity codes
64	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	The system must have the ability to update employee characteristics - Skills - Language Ability to keep historical data for employee
65	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to select employees from any part of the organisation or external resources and allocate shifts i.e. for an absent employee. This will assist with outsourcing. Implies resources from an external company. View of these outsourced agents.
66	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should cater for positions that have not been filled (open positions). These capacity types should be easily identifiable. This would assist in planning shifts ahead.
67	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should show the acting status and who is acting for another employee. Can be part of activity codes. Placed over the agent's schedule. Will indicate the acting role.
68	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should provide the ability to temporary relocate an

				employee for a defined period.
69	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should be able to flag non-available resources during the relocation period. For whatever reason employees are relocated.
70	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should allow an employee to have various characteristics: b. Multiple sets of positions i.e. Agent taking calls and performing non telephony contact functions as well.
71	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Access control. Ability to manage access. i.e Shift planners should only be able to see and have access to their area/ module/ segment that they are managing. Also ability to view other sites/areas if required.
72	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to create or auto-create templates for events. Ability to define the resource requirements per event. Should be able to add comments
73	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Ability to search for available resources with the required skill and experience. Should be able to select resources from this list and allocate them to the open position
74	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	Only available resources should be visible for an event for selection

75	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should allow for the configuration of parameters. This should be applicable via an easy to use User interface: <ul style="list-style-type: none"> <li>• Users</li> <li>• What data they can see</li> <li>• What tasks they can perform</li> <li>• etc.</li> </ul>
76	Meeting the Conceptual Scope of Work	Be able to Manage and schedule resources according to the Forecasted plan. Using resources skills and availability	Resource and Shift Planning (Scheduling)	System should be able to manage historical records. i.e. purging, deletion etc. for employees, Positions, Shifts, Acting Up, Relocations and Organisation Structure etc.
77	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provide the ability to manage staff/resources adherence in real time
78	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to create automated and optimised schedules so staff are utilised in the best and most cost-efficient way.
79	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should provide the capability to schedule any Worklists / faults / Off phone work, Back office.

80	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should allow the user interface to be configurable • Organisational hierarchy according to location etc. • Organisational unit/Regional/Site • National over- view • Or other criteria.
81	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should provide a consolidated view of the schedule including access to capacity availability
82	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to make schedule adjustments at any time i.e. change management (agents on different activities- relocate resources to where required)
83	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to compare previous day, week, month etc.
84	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to integrate with real time data from various channels i.e. Telephony, Multimedia, Social media channel etc. Vendor to provide details.
85	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to easily create and compare schedules using a simple and easy to use user interface - Filter on periods i.e. every Tuesday for last month/yearly etc. - Other filters as well

86	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provision of user interface wizards to managing the schedule and also to resolve conflicts
87	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to provide optimised scheduling, configurable against any area of the business over any time frame or period
88	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should provide warning / alerts or notifications when transgressing any : - business processes, policy , rules etc - Schedules
89	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provide the ability to have in-day optimisation, enabling automatic schedule for exceptions / exclusions that occur during the day – to enable the resolution of gaps during the day.- Servers issues etc. In the event of issues in CRM(Telephony), no communication with the WFM, then Real Time Adherence status (colour coding) will be red to indicate Non-adherence. Afterwards an adherence exclusion needs will be done ONLY if it affects All users. Ability to automatically alert support in case of issues.

90	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should be able to automatically schedule jobs that require multiple resources, with different skill requirements
91	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should be able to automatically schedule jobs that require multiple stages (for example field retail work, workflow). You should be able to configure the requirements for the resource per stage
92	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Support automatic scheduling of all of the following multiple-stage task time dependencies: - Start to start with specified gap - Start to finish with specified gap - Same day Gaps are time gaps i.e. because of Power failure. Ability to cater for the gap.
93	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should have the ability to support varying workflows based on type of work and/or resource.
94	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to automatically schedule jobs with appropriate length of time spanning over non-working periods (i.e. multi-day tasks) • Overnight • Weekends • Over planned breaks.

95	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to insert high priority workloads into the schedule and update the schedule automatically
96	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The system should provide for simple, automated and optimised scheduling: <ul style="list-style-type: none"> <li>• Drag-and-Drop</li> <li>- Highlight tasks using resources where required skills are available</li> <li>• Selecting single task or multiple tasks</li> <li>• Alerts when business rules or business constraints are violated</li> </ul>
97	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The scheduling module should be configurable to support various types of workloads/activities. (Campaign management) <ul style="list-style-type: none"> <li>• Faults</li> <li>• Planned and Unplanned</li> <li>• etc.</li> </ul>
98	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to configure and schedule work activity type in system i.e.: <ul style="list-style-type: none"> <li>• High priority -</li> <li>• Low Priority -</li> <li>• etc.</li> </ul>
99	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability of the system to provide notification of conflicts or predictions where service levels will not be met based on events: <ul style="list-style-type: none"> <li>• delays in resource arrival</li> <li>• longer than expected durations</li> <li>• sickness</li> <li>• etc.</li> </ul>

100	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability of system to allow the configuration and definition of a business logic hierarchy as needed to schedule. • I.e. the use of overtime only when regular time cannot be utilized
101	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to automatically calculate costs when assigning resources. This might be relevant when using the outsourcing agent model.
102	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to publish schedules on various platforms (Online, app etc). Vendor to provide details of how the system provides this capability.
103	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to modify schedule parameters: • assignment duration • planned start and/or finish
104	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability for administrator to centrally or locally modify the client interface (end user) features * Profiles (Individual / Group) * Agent administration (Adding / modifying agents) etc * Access control

105	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to provide automatic /predictive indication where service levels are/will be dropping. Also to indicate what areas are affecting these service levels: • Late arrivals • Unplanned outages • etc.
106	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provide easy automatic scheduling upon demand.
107	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	System should provide advanced Search, Sort and Filter features to quickly access required data, resources etc.
108	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to automatically trigger an escalation to higher levels via email, SMS, social media etc.
109	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to provide automatic resolutions to situations.
110	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to define and configure alerts and notifications in the system. (SMS, Email etc.) For instance for the schedulers to notify them of: potential scheduling conflicts etc.

111	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to provide a "plan vs. actual" analysis of the schedule
112	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provide automatic and Manual re-scheduling based on daily events such as: <ul style="list-style-type: none"> <li>• Late or early resource arrival</li> <li>• Late or early task completion</li> <li>• Sickness, and other unexpected events</li> <li>• Job cancellation</li> <li>• etc.</li> </ul>
113	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to define and configure business objectives: <ul style="list-style-type: none"> <li>• Cost reduction</li> <li>• Increase service level</li> <li>• Growth</li> <li>• Regulatory compliance</li> </ul> These should be considered when auto-scheduling
114	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to automatically schedule flexible lunch breaks (e.g. 1 hour break between 11 AM and 2 PM) for scheduled personnel resources
115	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	The solution should support multi-channel operations, where workers handle multiple operations such as front office, customer-facing interactions or back-office processing simultaneously.

116	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to synchronize agent schedules with a calendar i.e. MS Outlook calendar, Gmail calendar etc.
117	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to allow agents to swap shifts. To swap with correct skill, knowledge, compatible etc.
118	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Provision of an Operations manager dashboard
119	Meeting the Conceptual Scope of Work	Determine how staff will be deployed to meet service levels and adjust this to match workloads. Ensures that the right number of people are available for the workload demand. Monitoring day-to-day operations on a real time basis to check adherence and update and allowing you to adjust staff levels to ensure service levels are maintained. Allowing you to manage the operational challenges as well	Work Force Management Scheduling and Operations Management	Ability to check adherence to tasks and schedules.
120	Meeting the Conceptual Scope of Work	Integration of Work force management system modules	Integration	The forecasting, planning, shift planning, resource scheduling, mobility, operation management and reporting modules should be fully integrated.
121	Meeting the Conceptual Scope of Work	Integration of Work force management system modules	Integration	Integration to weather system
122	Meeting the Conceptual Scope of Work	System provision of audit logs to indicate activities performed by resources	Security	Provision of audit logs.

123		Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Ability to access functionalities of the solution via mobi access Mobi access: Access via any digital mobile device
124	Meeting the Conceptual Scope of Work	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Ability to work in off-line mode when the user cannot connect to the network.
125	Meeting the Conceptual Scope of Work	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Ability for the agent to create absence requests (e.g. holiday, training, sickness, Meetings, etc.). Ability to manage rights of the end user as well. Any request should have the ability to be authorised
126	Meeting the Conceptual Scope of Work	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Ability to send and receive bi-directional messages between resources. Ability to acknowledge these messages. Ability to send push notifications. Ability to verify if messages were read/actioned etc.
127	Meeting the Conceptual Scope of Work	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Provide Integration with the scheduling module so that the agents schedule is available to view on a mobile device. They can also see if there are changes to the schedule etc.
128	Meeting the Conceptual Scope of Work	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	The ability to locate a colleague who has the required skills to support standing in /shift swaps, overtime requests, leave requests etc.Any request should have the ability to be authorised
129	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to provide standard reports in correct format, sorted

130	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to easily and dynamically create new/custom reports using a simple GUI interface • drag and drop methodology • etc.
131	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability of the system to provide offline data for integrated system to report on i.e. MS Power BI. Data should be in correct format (No need for developers to do additional work)
132	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to develop, configure and provide a dashboard view of KPIs. • Current performance against forecast in real time • Notifications • Service levels adherence • Call volume forecast vs actual • etc. Use of colour/icons etc. indicators to easily identify activity types, status etc. Data should be in correct format (No need for developers to do additional work)
133	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to drill down to lower levels of KPI data i.e. From organisational hierarchy level down to the single resource level to a hour / single day etc.
134	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to provide alerts when KPIs are not being met or reaching negative threshold levels Ability to easily determine problems i.e. areas where KPIs are out of target.
135	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Ability to provide for development and configuration of centralised view/monitoring of measures for key

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				metrics in real time and retrospective i.e.: Similar to dashboard • Queue time • Service level • Forecast accuracy • Overtime • Business rule violations • Skill violations • Response time • Etc.
136	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Provide ability to distribute/publish reports (related to dashboards)
137	Meeting the Conceptual Scope of Work	The ability of the solution to provide standard generic reports and for the user to also have the flexibility to easily and dynamically create custom reports	Reports	Required Report: Number of resources available / scheduled • Call takers • Scheduled for multimedia, worklists, move in-move in etc. • Snapshot view • Negative Shrinkage • Annual leave This is free up time for analysis Real time and retrospective

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**Non-Functional Requirements:**

<b>ID</b>	<b>Type</b>	<b>Criterion</b>	<b>Functional Requirement</b>	<b>Requirement description</b>
1	Meeting the Scope of Work Required	Software Licensing	Licensing	Provision of the necessary software licences with maintenance & support for at least 10-year period
2	Meeting the Scope of Work Required	Solution Design	Design	Prepare and Quality Assure the functional specifications for the solution,
3	Meeting the Scope of Work Required	Solution Design	Design	Prepare the solution design
4	Meeting the Scope of Work Required	Solution Design	Design	Prepare and quality assure the physical design of the solution
5	Meeting the Scope of Work Required	Solution Design	Design	Prepare solution monitoring and SLA reporting design
6	Meeting the Scope of Work Required	Solution Design	Design	All designs must be approved at the relevant Eskom Architecture Design Governance committee
7	Meeting the Scope of Work Required	Solution Hardware / Infrastructure	Infrastructure	Provide the necessary hardware design? For the solution for all the non-prod, prod & additional environments stated in the SOW and BRS documents. The hardware supplied. Design? Must meet the growth, sizing, and availability and design requirements stipulated. It should allow flexibility to adjust capacity for the contract period.

8	Meeting the Scope of Work Required	Solution Hardware / Infrastructure	Infrastructure	Plan and Implement the solution on the following environments through the project lifecycle * Non Production - Development (sandbox) - Testing(QA), - Pre-production (sized as production), * Production - Disaster recovery
9	Meeting the Scope of Work Required	Solution Configuration and Development		Configuration - Configure all required functional and non-functional settings in the solution to ensure optimal and secure operations
10	Meeting the Scope of Work Required	Solution Configuration and Development	Configuration and Development	Custom development as required to meet the business requirements (specific functionality and integration that is required).
11	Meeting the Scope of Work Required	Solution Configuration and Development	Configuration and Development	Development must be modular (add-ons) to not compromise upgrades of the commercial application
12	Meeting the Scope of Work Required	Data Migration from the existing solution into the new solution	Data Migration	Provide data migration design and confirm and manage all required data migration activities with all the required parties Historic data should be migrated Also will assist with trends etc
13	Meeting the Scope of Work Required	Data Migration from the existing solution into the new solution	Data Migration	Build and test the data migration through all phases of the project
14	Meeting the Scope of Work Required	Data Migration from the existing solution into the new solution	Data Migration	Provide required data migration reconciliation reports and obtain sign-off of mock/dress rehearsal data migration before go-live

15	Meeting the Scope of Work Required	Data Migration from the existing solution into the new solution	Data Migration	Co-ordinate and manage all data migration activities
16	Meeting the Scope of Work Required	Human Change & Communication Management	Human Change & Communication Management	Change & Communication management as required. The Business and End Users of the system must be properly communicated with and all necessary aspects of human change management as it pertains to the new system must take place. Resources used are important.
17	Meeting the Scope of Work Required	Training Requirements	Training	Training to be documented and performed in English
18	Meeting the Scope of Work Required	Training Requirements	Training	Training to be conducted in South African time
19	Meeting the Scope of Work Required	Training Requirements	Training	Training to include Administration (Including Design, Implementation, Configuration, Maintenance)
20	Meeting the Scope of Work Required	Training Requirements	Training	Should provide support (All levels)
21	Meeting the Scope of Work Required	Training Requirements	Training	End User Training at all levels as required to be provided.
22	Meeting the Scope of Work Required	Training Requirements	Training	Classroom-based and/or web-based (Online) training is required.
23	Meeting the Scope of Work Required	Training Requirements	Training	Co-ordinate and manage all aspects of training including role design, user mapping and training delivery

24	Meeting the Scope of Work Required	Training Requirements	Training	Developer (IDE environment, use case studies etc.) training to be provided. Also, to include first line support training, i.e. basic troubleshooting guide on system config and settings. All roles should be specified.
25	Meeting the Scope of Work Required	Eskom Support Staff Training	Training	Support Staff Training. Knowledge transfer of assigned Eskom staff through all stages of the project lifecycle and using a defined skills transfer program. Classroom-based and/or web-based training is also required.
26	Meeting the Scope of Work Required	Eskom Support Staff Training	Training	A knowledge transfer report to be submitted for each project milestone
27	Meeting the Scope of Work Required	Deploy the solution into Production	Deployment	Obtain pre-transfer Architecture Governance approval
28	Meeting the Scope of Work Required	Deploy the solution into Production	Deployment	Detail Plan of all the deployment activities and a roll back plan
29	Meeting the Scope of Work Required	Deploy the solution into Production	Deployment	Complete all required documents and obtain approval for the go-live
30	Meeting the Scope of Work Required	Deploy the solution into Production	Deployment	Deploy the solution in the production environment
31	Meeting the Scope of Work Required	Stabilisation of the solution	Stabilisation	Once the solution is implemented in production a 3 month stabilisation period is required by the Vendor.
32	Meeting the Scope of Work Required	Stabilisation of the solution	Stabilisation	During this time Vendor must produce the monthly reports that will be submitted to Eskom reporting on the SLA metrics achieved

33	Meeting the Scope of Work Required	Support and Maintenance	Service Provision for Software Solution	Please provide an explanation of circumstances in which the services could be suspended. Eskom will only agree to suspension on an emergency basis in the event of Supplier having to prevent or mitigate the effects of disabling code, subject to Supplier then escalating to ESKOM and agreeing to a timeframe for restoration of services.
34	Meeting the Scope of Work Required	Support and Maintenance	Service Provision for Software Solution	Please provide an explanation of circumstances in which the services could be terminated.
35	Meeting the Scope of Work Required	Support and Maintenance	Service Provision for Software Solution	Please provide an explanation of notification, or an option to subscribe to a notification service, in the event of changes made to the terms governing the service.
36	Meeting the Scope of Work Required	Support and Maintenance	Support and Maintenance	Ensure SLA is concluded and includes all SLA metrics/requirements. SLA kicks in during the stabilisation period and thereafter.
37	Meeting the Scope of Work Required	Support and Maintenance	Support and Maintenance	During this time Vendor must produce the agreed Monthly reporting of SLA metrics achieved. Contract will be drawn up with penalties for not meeting SLA metrics.
38	Meeting the Scope of Work Required	Resiliency and business continuity management	Secure by design with sufficient redundancy	Provide the architecture roadmap. Should Indicate via the design <ul style="list-style-type: none"> <li>• Tiered architecture</li> <li>• Resilient against cyber exploitation</li> <li>• Where the controls are visible</li> </ul>

39	Project Governance	Meeting the project delivery timelines	Project Management	Various Eskom organisational stakeholders will be involved in the project. In order to ensure an integrated approach, project management is required. The Respondent shall provide a detailed proposal to manage and perform all project management activities in accordance with Eskom project governance and milestone timeframes. These activities shall be performed by resource/s based in South Africa for the duration of the project.
40	Project Governance	Change management during all stages of the Project.	Change Management	The vendor is to provide Change management during all stages of the Project: <ul style="list-style-type: none"> <li>- Compile a change management plan.</li> <li>- Stakeholder identification and communication.</li> <li>- Preparation for change.</li> <li>- Awareness</li> <li>-Change implementation.</li> </ul>
41	Device Support	Capabilities provided on a mobile platform by the Work force management system	Mobile Application Capability	Compatibility of the solution to mobile phones and browsers.

**Security:**

ID	Type	Criterion	Functional Requirement	Requirement description
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1	Meeting the Scope of Work Required	Compatibility Authentication Mechanism/s Substantiate by providing details of standards that are supported	Information Security	<p><b>Authentication for the following Categories:</b></p> <ul style="list-style-type: none"> <li>* <b>Technical Support Team</b></li> <li>* <b>User</b></li> <li>* <b>System</b></li> </ul> <p>Access Control and User Account Management Does your Proposed Solution comply and is Compatible with Microsoft Active Directory, AD Azure, SAML2, OAuth2 and/or LDAPv3, MFA ?</p>
2	Meeting the Scope of Work Required	Certificate from the OEM or Reputable Authority	Information Security	<p><b>Information Security Threat Management</b></p> <p>Please advise to what extend is your Solution Compliant with international best practices with regards to each of the below:</p> <ol style="list-style-type: none"> <li>1. Malware</li> <li>2. Cyber Attack</li> <li>3. Anti-Virus</li> <li>4. Audit trail</li> </ol>
3	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security	<p><b>E2E Encryption</b></p> <p>Encryption of Data in transit and in Rest Does your Proposed Solution comply and is compatible with the latest TLS and Cypher Standards to protect and encrypt data? Protect the chain of custody with transition from old to new system</p>
4	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security	<p><b>POPIA</b></p> <p>All management and handling of data should comply with the Protection of Personal Information (POPI) Act. Does your Proposed Solution take the POPIA requirements into consideration</p>
5	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security Confidentiality + Integrity and protection against Cyber Exploit	<p><b>Data Classification</b></p> <p>All ICT Projects solutions in Eskom need to indicate a detail Information Classification criteria matrix ( Controlled Disclosure, Confidential, Secret, Top Secret) to be indicated by Business and System owner and need to be visible for PM. Does your System Data align with, National Cyber</p>

				Security Policy Framework as well as Critical Infrastructure Protection Act requirements to Secure data/information against Cyber Exploitation?
6	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security	<p><b>Data Storage</b></p> <p>a) For Cloud-based Off-Premises Solutions, do the respondents or via joint venture partner have the hosting datacentres within South African borders? Do you separate your application and data layers in order to segregate the DMZ environments to improve security of access, if not please elaborate on how you achieve this in terms of security</p>
7	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security	b) if not please elaborate on how you achieve this in terms of security
8	Meeting the Scope of Work Required	Substantiate by providing details of standards that are supported and ensure that these Capabilities are detailed in the proposal	Information Security	<p><b>SIEM Integration</b></p> <p>Does your Proposed Solution provide a Feed for SIEM Integration using Standard Technologies? i.e. Syslog, Windows Events, etc.</p>
9	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet but enforce the use of VPNs.</p>	APPLICATION AND DATA SECURITY: Access, Remote Storage & Connectivity	<p><b>Secure Web Access and Connectivity</b></p> <p>Can the solution be securely accessed via a Public: Web Portal?</p> <p>Are any form of sensitive data stored remotely on the Web Client and if so, are mechanisms in place to secure and remove such data?</p> <p>Describe Security Mechanisms and Protocols</p>

10	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet but enforce the use of VPNs.</p>	<p>APPLICATION AND DATA SECURITY: Access, Remote Storage &amp; Connectivity</p>	<p><b>Secure Mobile App / Device Access and Connectivity</b> Can the solution be accessed via a Public: Mobile App? Are any form of sensitive data stored remotely on the Mobile Client and if so are mechanisms in place to secure and remove such data? Describe Security Mechanisms and Protocols</p>
11	Meeting the Scope of Work Required	<p>Capabilities provided on a mobile platform by the Work force management system</p>	<p>Mobile Application Capability</p>	<p>Provide Secure connections for mobile use to organisation.</p>

**Cloud requirements:**

ID	Type	Criterion	Functional Requirement	Requirement description
1	Meeting the Scope of Work Required	<p>Cloud Risk Assessment</p> <p>Cloud Policy</p> <p>2.2.12.1 The cloud service model (i.e. IaaS, PaaS or SaaS) and deployment model (i.e. Private, Public or Hybrid cloud) shall be determined by a pre-defined set of Cloud selection criteria as per the Selection Criteria set out by Group IT.</p>	<p>ARCHITECTURE Cloud Service Model</p>	<p>Please specify in detail all the Cloud Service Models that are possible with your Solution (e.g. IaaS, PaaS, SaaS, Hybrid, DaaS, XaaS)? Eskom prefers a SaaS Model on its own internal IaaS Service which is provided by a 3rd Party on Eskom Premises. If not possible kindly explain why.</p>
2	Meeting the Scope of Work Required	<p>Cloud Risk Assessment</p> <p>Cloud Policy</p> <p>2.2.12.1 The cloud service model (i.e. IaaS, PaaS or SaaS) and deployment model (i.e. Private, Public or Hybrid cloud) shall be determined by a pre-defined set of Cloud selection criteria as per the Selection Criteria set out by Group IT.</p>	<p>ARCHITECTURE Cloud Service Deployment</p>	<p>Please specify your Service Deployment Model (Private, Public or Hybrid)?</p>
3	Meeting the Scope of Work Required	<p>Cloud Risk Assessment</p> <p>Cloud Policy</p> <p>2.2.12.1 The cloud service model (i.e. IaaS, PaaS or SaaS) and deployment model (i.e. Private, Public or Hybrid cloud) shall be determined by a pre-defined set of Cloud selection criteria as per the Selection Criteria set out by Group IT.</p>	<p>COSTING Contractual and Licencing Models</p>	<p>Commercial Contractual and Licencing Model (Fixed Contract, Subscriptions or Consumptive)?</p>

4	Meeting the Scope of Work Required	<p>Cloud Risk Assessment</p> <p>Cloud Policy</p> <p>2.2.12.1 The cloud service model (i.e. IaaS, PaaS or SaaS) and deployment model (i.e. Private, Public or Hybrid cloud) shall be determined by a pre-defined set of Cloud selection criteria as per the Selection Criteria set out by Group IT.</p>	DATA OWNERSHIP	Please confirm that ESKOM retains ownership of the data that ESKOM stores, transmits, and/or creates with the cloud service.
5	Meeting the Scope of Work Required	ESKOM prohibits this unless otherwise agreed in writing with ESKOM and then under specific circumstances and separate terms being agreed.	DATA OWNERSHIP	<p>a) Does the Supplier reserve any rights to use ESKOM data for the purposes of operating and improving the services?</p> <p>b) Does the Supplier reserve the right to use ESKOM data for the purposes of advertising?</p> <p>c) Does the Supplier reserve the right to use, or make ESKOM data available as anonymized open data (through standard APIs)?</p>
6	Meeting the Scope of Work Required	Does the Supplier's compliance with copyright laws and other applicable intellectual property rights restrict the type of content ESKOM can store with the cloud service?	DATA OWNERSHIP	<p>a) Do the Supplier's terms apply to metadata?</p> <p>b) Does ESKOM gain ownership of metadata generated by the cloud service system during procedures of upload, management, download, and migration?</p> <p>c) Does ESKOM have the right to access these metadata during the contractual relationship?</p>
7	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.5 Eskom shall ensure that it is adequately protected against CSP vendor lock-in and that all Eskom data and information be returned to Eskom as and when required.</p> <p>Cloud Data Standard</p> <p>Baseline Security Controls</p> <p>Data availability – Data must be replicated to an on-premise location, or the Cloud environment of a different Cloud Service Provider, to ensure continuous access thereto in the event of a disruption.</p>	AVAILABILITY, RETRIEVAL AND USE Availability	Is the availability of the cloud service dependent on any 3rd party and what risks are associated with this dependency?

8	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.2 Eskom shall ensure that SLAs contain the high availability requirements (as per the Business Impact Assessment done by Eskom) for applications and data in the event of planned or unplanned disruptions or outages.</p>	<p>AVAILABILITY, RETRIEVAL AND USE</p> <p>Availability</p>	<p>a) Does the degree of availability of the data meet ESKOM business needs as defined?</p> <p>b) Does the degree of availability of the data allow ESKOM to comply with access to information, data retention, audit and privacy laws?</p> <p>c) Does the degree of availability of the data allow ESKOM to comply with the right of persons to access their own personal information?</p> <p>d) Does the degree of availability of the data allow ESKOM to comply with the right of authorities to legally access ESKOM data for investigation, audit, control or judicial purposes?</p>
9	Meeting the Scope of Work Required	<p>Solution Performance Requirement</p> <p>Eskom shall ensure that SLAs contain the associated system, integration and data exchange performance requirements for applications and data transfers.</p>	<p>AVAILABILITY, RETRIEVAL AND USE</p> <p>Availability</p>	<p>Does the Cloud Service (availability, latency, performance, integration) support real-time, semi-real-time or delayed interactive data exchange?</p>
10	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION:</p> <p>Backup-Data Storage</p>	<p>Is backup of all data and metadata included as part of the service offering and are there tools and interfaces available for Administrators to interact with and restore this data?</p>
11	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION:</p> <p>Backup-Data Storage</p>	<p>Do the Supplier's terms/offering apply to any backup created?</p>
12	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION:</p> <p>Backup-Data Storage</p>	<p>Does ESKOM have audit rights to verify that back-ups have been done as contracted?</p>
13	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION:</p> <p>Data Preservation-Data Retention</p>	<p>Are the procedures, time and cost for restoring ESKOM data following a service outage clearly defined?</p>
14	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION:</p> <p>Data Preservation-Data Retention</p>	<p>In the event of accidental data deletion, does the Supplier bear responsibility for data recovery?</p>

15	Meeting the Scope of Work Required	<p>Could Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION: Data Preservation-Data Retention</p>	<p>Are there procedures outlined to indicate that ESKOM data will be managed over time in a manner that preserves their usability, reliability, authenticity and integrity?</p>
16	Meeting the Scope of Work Required	<p>Could Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION: Data Preservation-Data Retention</p>	<p>Are there procedures to ensure file integrity during transfer of ESKOM data into and out of the system?</p>
17	Meeting the Scope of Work Required	<p>Could Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION: Data Preservation-Data Retention</p>	<p>Does the Supplier offer any service levels related to data restoration in the event of data loss or corruption?</p>
18	Meeting the Scope of Work Required	<p>Could Policy</p> <p>2.2.4.3 Business continuity, disaster recovery plans, backups and redundancy mechanisms must be reviewed by Eskom.</p>	<p>DATA STORAGE AND PRESERVATION: Data Preservation-Data Retention</p>	<p>Will ESKOM be notified by the Supplier of changes made to ESKOM data due to evolution of the service?</p>
19	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>All data retentions requirements as per Policy for Records Retention periods must be adhered to. 2.2.5.4 The CSP must delete/eliminate any trace of Eskom data/information from its systems at the end of the Contract in accordance with the guidelines defined in National Institute of Standards and Technology (NIST).</p>	<p>DATA STORAGE AND PRESERVATION: Data Retention and Disposition</p>	<p>a) At contract termination the CSP must be able to destroy ESKOM data and associated metadata (and all their copies, including backups) in compliance with ESKOM data retention and disposition policies. and b) Will the Data be immediately and permanently destroyed in a manner that prevents their reconstruction, according to a secure destruction policy ensuring confidentiality of the data until their complete deletion? c) Will the Supplier deliver and/or give access to audit trails of the destruction activity? d) Will the Supplier supply an attestation, report, or statement of deletion (if required by ESKOM internal or legal destruction policies)?</p>

20	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>All data retentions requirements as per Policy for Records Retention periods must be adhered to. 2.2.5.4 The CSP must delete/eliminate any trace of Eskom data/information from its systems at the end of the Contract in accordance with the guidelines defined in National Institute of Standards and Technology (NIST).</p>	DATA STORAGE AND PRESERVATION: Data Retention and Disposition	Will ESKOM be clearly informed about the procedure and conditions for the destruction of ESKOM data?
21	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>All data retentions requirements as per Policy for Records Retention periods must be adhered to. 2.2.5.4 The CSP must delete/eliminate any trace of Eskom data/information from its systems at the end of the Contract in accordance with the guidelines defined in National Institute of Standards and Technology (NIST).</p>	DATA STORAGE AND PRESERVATION: Data Retention and Disposition	Is there information available about the nature and content of the associated metadata generated by the cloud service system?
22	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>All data retentions requirements as per Policy for Records Retention periods must be adhered to. 2.2.5.4 The CSP must delete/eliminate any trace of Eskom data/information from its systems at the end of the Contract in accordance with the guidelines defined in National Institute of Standards and Technology (NIST).</p>	DATA STORAGE AND PRESERVATION: Data Retention and Disposition	Will the Supplier destroy associated metadata upon disposition of ESKOM data?
23	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.6.4 Eskom must ensure that the CSP's maintain the same levels of security and controls required across all platforms and data centres.</p> <p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Security	Does the system prevent unauthorized access, use, alteration or destruction of ESKOM data? Also refer to Security Section for further details required.

24	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Security	ESKOM data is secured during procedures of transfer into and out of the system? Also refer to Security Section for further details required.
25	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Security	Does the system provide and give ESKOM access to audit trails, metadata and/or access logs to demonstrate security measures
26	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Security	Will ESKOM be notified in the case of a security breach or system malfunction?
27	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Security	<p>a) Does the Supplier use the services of a sub-contractor?</p> <p>b) Does the Supplier offer information about the identity of the sub-contractor and its tasks?</p> <p>c) Are subcontractors held to the same level of legal obligations as the Supplier of the cloud service?</p>
28	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Confidentiality	Does the Supplier have a confidentiality policy with regards to its employees, partners and subcontractors?

29	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	<p>SECURITY, CONFIDENTIALITY AND PRIVACY: Privacy</p>	<p>Does the Supplier's terms include privacy, confidentiality, or security policies for sensitive, confidential, personal or other special kinds of data? If so, please confirm that these are aligned with Eskom's requirements.</p>
30	Meeting the Scope of Work Required	<p>Cloud Data Standard Baseline Security Control</p> <p>Access to Cloud environment – access control to Cloud environments, as well as the ingress and egress movement of data, will be done using existing mechanisms and other complementary Cloud-specific mechanisms. Do not enable direct remote access to Cloud VMs from the Internet, but enforce the use of VPNs.</p>	<p>SECURITY, CONFIDENTIALITY AND PRIVACY: Privacy</p>	<p>a) Is it clearly stated what information (including personal information) is collected about ESKOM, why it is collected and how it will be used by the Supplier? b) Does the Supplier share this information with other companies, organizations, or individuals without ESKOM's consent? c) If the Supplier shares this information with their affiliates for processing reasons, is this done in compliance with an existing privacy, confidentiality, or security policy</p>
31	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.10.3 Eskom must ensure the adoption of common and open standards and that the overall integrity and ease of integration with core systems are maintained.</p> <p>2.2.11.1 Eskom must ensure contractually that the CSP complies with all applicable information security policies and standards.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <p>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</p>	<p>SECURITY, CONFIDENTIALITY AND PRIVACY: Accreditation and Auditing - Security</p>	<p>Please list all relevant Cloud Compliancy and Audit reports for your Cloud Service. (e.g. ISO27018, SOC2 etc.)</p>

32	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.10.3 Eskom must ensure the adoption of common and open standards and that the overall integrity and ease of integration with core systems are maintained.</p> <p>2.2.11.1 Eskom must ensure contractually that the CSP complies with all applicable information security policies and standards.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <p>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Accreditation and Auditing - Security	Is the Supplier audited on a systematic, regular and independent basis by a third-party in order to demonstrate compliance with security, confidentiality and privacy policies?
33	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.10.3 Eskom must ensure the adoption of common and open standards and that the overall integrity and ease of integration with core systems are maintained.</p> <p>2.2.11.1 Eskom must ensure contractually that the CSP complies with all applicable information security policies and standards.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <p>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</p>	SECURITY, CONFIDENTIALITY AND PRIVACY: Accreditation and Auditing - Security	Does ESKOM have access to information such as the certifying or audit body and the expiration date of the certification?

34	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p>	<p>DATA LOCATION AND CROSS-BORDER DATA FLOWS: Data Location - Data</p>	<p>Is the service hosted outside the borders of South Africa? If so, please specify the country where the service is hosted.</p> <p>For this Solution Eskom prefers its own internal IaaS Service which is provided by a 3rd Party on Eskom Premises but if not possible this could be EU</p>
35	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p>	<p>DATA LOCATION AND CROSS-BORDER DATA FLOWS: Data Locaton - Data</p>	<p>a) Does the CSP clearly state the legal jurisdiction in which the agreement will be enforced, and potential disputes will be resolved, in the event that data is stored or processed outside of South Africa?</p> <p>b) Will it be possible for ESKOM stored data to be subject to disclosure orders by national or foreign security authorities?</p>
36	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p>	<p>DATA LOCATION AND CROSS-BORDER DATA FLOWS: Data Locaton - Security and Access</p>	<p>Please specify the location where all systems are located and advise re ESKOM's access rights to such location and facilities.</p>

37	Meeting the Scope of Work Required	<p>Cloud Data Standard</p> <p>C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. Application processing must be done on physical or virtual servers that is exclusively for the use of Eskom, its subsidiaries and users, e.g. a SaaS instance that is not shared with a non-Eskom entity.</li> <li>2. Eskom Information shall not share storage services with a non-Eskom entity.</li> </ol>	<p>DATA LOCATION AND CROSS-BORDER DATA FLOWS: Data Locaton - Data</p>	<p>Does your Cloud service have the option for dedicated Compute and Storage infrastructure that is not shared by any other cloud tenants</p>
38	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</li> <li>2. The Data Centres(DCs) of the CSP, including backup DCs, must be in sovereign regions with privacy and data governance laws at least equal to those of South Africa. Eskom information must not be stored in data centres based in countries with authoritarian laws that make provision for the seizure of information belonging to any organisation during an unrelated legal matter.</li> <li>3. User and Service authentication must be done using the current Eskom identity and access management solution.</li> </ol>	<p>DATA LOCATION AND CROSS-BORDER DATA FLOWS: Data Locaton - Data</p>	<p>Does ESKOM have the option to specify the location, in which ESKOM data, metadata and their copies will be stored?</p>



**TENDER SCOPE OF WORK**  
**Group Information Technology**

<b>Template Identifier</b>	240-IT042	<b>Rev</b>	1
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<b>Review Date</b>	April 2028		

C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:

39	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</li> <li>2. The Data Centres(DCs) of the CSP, including backup DCs, must be in sovereign regions with privacy and data governance laws at least equal to those of South Africa. Eskom information must not be stored in data centres based in countries with authoritarian laws that make provision for the seizure of information belonging to any organisation during an unrelated legal matters.</li> <li>3. User and Service authentication must be done using the current Eskom identity and access management solution.</li> </ol> <p>C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:</p>	BUSINESS CONTINUITY: Cloud Services	Under Supplier's standard offering, to what extent would Supplier withhold services? Supplier will warrant that it will not withhold Services provided hereunder, for any reason, including but not limited to a dispute between the parties arising under this Agreement, except as may be specifically authorized herein.
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40	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</li> <li>2. The Data Centres(DCs) of the CSP, including backup DCs, must be in sovereign regions with privacy and data governance laws at least equal to those of South Africa. Eskom information must not be stored in data centres based in countries with authoritarian laws that make provision for the seizure of information belonging to any organisation during an unrelated legal matter.</li> <li>3. User and Service authentication must be done using the current Eskom identity and access management solution.</li> </ol> <p>C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:</p>	<p>END OF SERVICE – CONTRACT TERMINATION: Cloud Transition and Integration</p>	<p>In the event that the Supplier terminates the service, will ESKOM be provided with sufficient lead time to migrate the service without service interruption?</p>
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41	<p>Meeting the Scope of Work Required</p>	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</li> <li>2. The Data Centres(DCs) of the CSP, including backup DCs, must be in sovereign regions with privacy and data governance laws at least equal to those of South Africa. Eskom information must not be stored in data centres based in countries with authoritarian laws that make provision for the seizure of information belonging to any organisation during an unrelated legal matters.</li> <li>3. User and Service authentication must be done using the current Eskom identity and access management solution.</li> </ol> <p>C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:</p>	<p>END OF SERVICE – CONTRACT TERMINATION: Cloud Transition and Integration</p>	<p>Please stipulate the procedure, cost (or cost estimate or costing basis), and time period for returning/transferring ESKOM data at the end of the contract.</p>
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42	Meeting the Scope of Work Required	<p>Cloud Policy</p> <p>2.2.2.3 Acceptable locations for the storage and/or processing of Eskom data must be identified in all contracts with CSPs by Eskom.</p> <p>2.2.2.4 In the case of hosting offshore, the location where the Cloud Service is hosted must be assessed and approved for compliance with relevant laws and regulations related to Data Privacy. Any other laws that may override data privacy laws or enable the government of the country in question to access data and personal information sometimes without any prior notification, permission or court order must be assessed.</p> <p>Cloud Data Standard</p> <p>B. Information that is classified as Confidential can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud and the following minimum conditions:</p> <ol style="list-style-type: none"> <li>1. The Cloud Service Provider (CSP) must have the required certifications as determined in the Eskom Cloud Security Standard.</li> <li>2. The Data Centres(DCs) of the CSP, including backup DCs, must be in sovereign regions with privacy and data governance laws at least equal to those of South Africa. Eskom information must not be stored in data centres based in countries with authoritarian laws that make provision for the seizure of information belonging to any organisation during an unrelated legal matters.</li> <li>3. User and Service authentication must be done using the current Eskom identity and access management solution.</li> </ol> <p>C. Information that is classified as Secret and Top Secret can be processed and/or stored in a Cloud environment subject to the Baseline Security Controls for the Cloud, the minimum conditions specified for Confidential information, as well as the following minimum conditions:</p>	<p>END OF SERVICE – CONTRACT TERMINATION: Cloud Transition and Integration</p>	<p>If the contract is terminated, will ESKOM data be transferred to ESKOM or to another Supplier of ESKOM's choice in a usable and interoperable format?</p>
43	Meeting the Scope of Work Required	<p>Integration mechanisms and models need to support secure and complete data exchange for hybrid solutions (on-premises and cloud) that align to the performance requirements of the solution ecosystem</p>	<p>SECURITY AND INTEGRATION: Cloud Data Transfer and Integration</p>	<p>Do you provide an Integration Model between on-premise environments and cloud environments to ensure secure, complete and performing data exchange and workloads?</p>

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**Demonstration requirements:**

<b>ID</b>	<b>Type</b>	<b>Criterion</b>	<b>Functional Requirement</b>	<b>Requirement description</b>
1	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Demonstrate a general overview of how the forecasting module works using historical data of the entire omni-channel enterprise universe. (Individual as well as multi-channel/multi queues-The ability to manage single or combined queues (Virtual or Quasi Virtual)) How to input data (preparing for forecast, how to include various factors, using trends)
2	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Demonstrate the functionality that depicts forecast vs intraday for planning purposes
3	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Ability of system to provide a graphical representation of forecasts against plan
4	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	How the system stores historical data and uses this data to forecast accurately. Vendor to provide access to historical data / categorised / seasonal etc (contacts, queues, average handling times, occupancy, volumes, Ave speed of answer etc ) (Historical data for at least 5 years)
5	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Demonstrate how the system caters for the administration of agent data: i.e. Agent details, contact details, skills alignment etc. From forecasting to real time change management. Automatic and seamless imprinting of agent data from various applications. How analytics is used for this.
6	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Indicate how data from the old system will be transferred/ enriched to the new system.

<b>7</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Demonstrate how data outliers are handled by system. Demonstrate by various methods i.e AI, Machine learning etc. Indicate the ease of detection.
<b>8</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Demonstrate ability to develop forecasts for various levels to align with business structure. Virtual and islanded sites
<b>9</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Ability of the system flexibility wrt. forecasting (i.e. click a button to do What if analysis etc) . Demonstrate the ease of making changes and the simplicity of use. (Not require development etc.)
<b>10</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	The ability of the system to forecast for various periods. Demonstrate short, medium, long term forecasting techniques and displays
<b>11</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	Ability of the system to export forecasts. How easy is this done.
<b>12</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Forecasting and Planning	How the system analyses and extracts data. i.e identify and exclude repeat calls. Ensures effective forecasts Provide various what if scenarios.
<b>13</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Demonstrate, using the forecast and planning data as well as the resources available to the organisation, how the system fits the schedule according to the plan
<b>14</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Show how this plan can be amended through many variables including business rules, vacation time, occupancy settings , skills etc. Functionality should be automated as far as possible
<b>15</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Demonstrate how these schedule are presented on dashboards, to supervisors, agents etc . Functionality should be automated as far as possible

<b>16</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Show alerts that include shortfalls in resources over time periods, any other operations potential future problems
<b>17</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Demonstrate flexibility (on-site as well as off-site agents) of system to change schedules via a approval process (incl. Automated workflows), schedule bidding or swapping.
<b>18</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Scheduling	Ease of access for agents to check their schedules, request changes, update pertinent information / Incl. via Mobile app
<b>19</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Operations Management	Demonstrate the ability of the system to easily manage the on-site and remote resources through the system dashboards and alerts - demonstrate real time adherence and changes need to be managed in an automated and intuitive manner
<b>20</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Operations Management	Enterprise-wide access to dashboards to enable viewing of performance.
<b>21</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Operations Management	The ability to use Machine learning and AI to suggest optimum changes or if rules agree, implement changes without human intervention
<b>22</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Operations Management	Ability to display high level as well as granular analytics driven by rules (AI and Machine learning)
<b>23</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Operations Management	Describe how escalation alerts are handled to various levels in the organisation.
<b>24</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Machine learning and Artificial Intelligence	Demonstrate how machine learning and AI assist staff in the forecast, planning, scheduling and monitoring processes

<b>25</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Ease of system use	Demonstrate the ease of system use (Functional, configuration etc). i.e Click a button and system should be able to use available data (i.e February) to create a forecast (What if) , drag n drop, Low code-no code etc
<b>26</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Integration	Ability of Integration to organisations existing systems -Broad based (CRM, ACD (Smartz), Outage management system, Billing system, Weather systems etc.)
<b>27</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Development & configuration	Development & Configuration- What development / configuration will internal resources be able to do / How / Interface etc. Indicate what activities can be done by different business, Group IT roles. What is Standard/built in functionality.
<b>28</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Help Function	Help knowledge repository to be included across all functionalities for intuitive and easy descriptions of functionality
<b>29</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Reporting	Demonstrate graphical displays of any set of data
<b>30</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Reporting	Demonstrate downloading/exporting of data to various formats. Preferred format includes Excel. Unique columns as per headings. Not merged.
<b>31</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Mobility	Demonstrate the functionalities of the solution via Mobi access Mobi access: Access via any digital mobile device
<b>32</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Mobility	How is Alerts implemented. Agent ability to send messages to site to indicate issues ie being late
<b>33</b>	Meeting the Conceptual Scope of Work	How well has the Tenderer described how scope requirements will be met? Do they understand what needs to be done? List concerns in Comments.	Audit Trail	Demonstrate the ability of the system in logging of all changes/activities

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## 2.2. Training/Transfer of skills:

### TRAINING

<b>11.1 Define the high-level training requirements:</b> <b>BRS Number</b> TR1.  TR2.  TR3.  TR4.  TR5.  TR6.  TR7.	<b>Functionality</b>  Training to be structured and performed in English  Conducted in South African time  Administration (Including Design, Implementation, Configuration, Maintenance, of WFM Solution, Backup and restores)  Support (All levels)  Developer (IDE environment, Use case studies etc.). Possibility to extend functionality of solution if applicable  Users / Employees to understand all functionality Provide a complete set of product documentation for all the modules within the solution <ul style="list-style-type: none"> <li><input type="checkbox"/> Training manuals</li> <li><input type="checkbox"/> User Guides</li> <li><input type="checkbox"/> Configuration Guides</li> <li><input type="checkbox"/> Integration Guides</li> <li><input type="checkbox"/> Administration Guides</li> </ul>
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Admin and End user training to be for internal staff, to be confirmed in vendor responses

- Approximately 700 resources within the Contact Centres and HUBs as well
  - +\_ 10% Super users
  - +\_ 90% End users
- HR Shared services are also using it
- This can be used for work force optimization of several frontline departments

### Possible types of high-level training that will be required:

**Course Name/Types of training**  
On the Job / Workshop training  
Frequency and phases of training  
Online based

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### 3. Service Level Agreement requirements

Proposed guidelines for Support:

- 8 x 5 support Mondays to Fridays with MTTR (Mean time to repair/resolve) of 4 hours
- Online support via ticket system • Email support
- Telephonic support
- Monthly end user support meeting

### 4. Approvals:

<b>End user / requestor:</b>	<b>Name:</b>	Siraatz Fakier
	<b>Designation:</b>	Project Manager
	<b>Date:</b>	11/07/2023
	<b>Signature:</b>	
<b>Senior Manager:</b>	<b>Name:</b>	Anthenia Phuku
	<b>Designation:</b>	Senior Manager
	<b>Date:</b>	11 July 2023
	<b>Signature:</b>	