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| **Sample: IT Requirements Template for Customer Service Knowledge Management** | |
| **Requirement** | **Answer** |
| **System Access** |  |
| Is the solution accessible using secure URL? Or the solution accessible via VPN? And would it be preferred? |  |
| Does the solution require any software/plugin to be installed on the user’s PC? |  |
| What operating systems and web browsers does the solution support? |  |
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| Other requirements for accessing the solution? |  |
| Does your solution have an API? |  |
| **Data Protection** |  |
| Does your company use secure coding practices? |  |
| Will you be outsourcing any activities in the delivery? |  |
| Does your system support Single Sign-On? |  |
| Does the solution provide role based access control? |  |
| Provide an overview of the granular access control capabilities of the system. |  |
| Describe the concurrency of the software architecture i.e. single or multitenanted? |  |
| Do all users have a unique login to the system? |  |
| **User Account Management & Role Based Access** |  |
| Does the system enable administrators to create/update/delete/disable user accounts via the web front-end? If not, is this performed by the vendor? |  |
| Does the solution provide role based access control? i.e. Users can be setup as Administrators/Regular users |  |
| Will the vendor setup the administrator role? Which business user will obtain this access? |  |
| Can users be setup as Administrators/Normal users? |  |
| Can users be setup as groups (i.e. agent)? |  |
| **Security** |  |
| Is there a regular regime of penetration testing? |  |
| Please describe the frequency and provide a copy of the latest report. |  |
| Are there regular vulnerability tests conducted? |  |
| Does the system support the password policy below?   * Must be at least 8 characters in length |  |
| * Must have at least one uppercase, lowercase, numeric, and non-alpha numeric character (e.g. #$!,) |  |
| * Must not contain your username |  |
| * Must not contain more than 3 repeating characters (e.g. AAA) |  |
| **Support** |  |
| Is the solution supported 24x7 or during business hours only? |  |
| Can technical support be contacted via a phone number, email or the website? |  |
| What level of support is covered by the contract at no extra cost? |  |
| Where is the support team located? Any time zone difference? |  |
| What is the escalation process? |  |
| Are SLA’s in place? |  |
| **Availability** |  |
| Is the system backed up daily (routinely)? |  |
| Does the system provide high availability without solution disruption? |  |
| Does the system have a disaster recovery alternative? |  |
| How long will it take switch over to the DR system? |  |
| Do we as a client need to do anything to use the DR system? |  |
| Does the system have data archiving? |  |
| How long will the data be kept for? |  |
| **Hosting** |  |
| Where is the system hosted? |  |
| Do you have high availability architecture? |  |
| Can you protect our data sovereignty? |  |
| **Reports** |  |
| What type of reports can the solution provide? |  |
| How will the reports be delivered? |  |
| What is the format of the report(s)? |  |
| **Upgrades** |  |
| What is your process for planning and notifying of system upgrades? |  |
| How often do upgrades take place? |  |
| **Defect Management** |  |
| Is there a support site to allow our organisation to log defects? |  |
| If not, how will defects be logged? |  |