SPECIFIC PROCUREMENT NOTICE – IT CONSULTING SERVICES

Procurement type:	IT Application Services
Title:	Invitation for Express of Interest of IT Application Services for e-Asset Management System, E- Reception System, and Smart-Conference
Project No.	AIIB CP - 00112
Deadline:	June 22, 2018

Date: June 8, 2018

The Asian Infrastructure Investment Bank (AIIB) now invites Expression of Interest (EOI) from qualified IT consulting firms, to provide IT Application Services for e-Asset Management System, E- Reception System, and Smart-Conference. A shortlist will be prepared following the pre-defined selection criteria for participating in the selection process. The selection will follow AIIB's draft Corporate Procurement Policy, relevant rules and procedures.

The letter of expression of interest (EOI) should provide information of the company's technical qualifications and experience in undertaking data management related service for international institutions in the past 3 years. The information should include: (i) name of the Project, (ii) name of the Client, (iii) duration of the similar cases, and (iv) a brief description of the similar cases.

Firms should submit all related documents as required under Annex A and B to the following Email address in PDF format, before 24:00 PM, June 21, 2018 (Beijing time).

Contact information:

> Corporate Procurement Division
> E-mail Address: it.procurement@aiib.org
> Facilities and Administration Services Department
> Asian Infrastructure Investment Bank
> B-9 Financial Street, Xicheng District
> 100033 BEIJING, CHINA

Annex A – Simplified Terms of Reference

Annex B - Summary of Consultant Information

Annex A: Simplified Terms of Reference

AIIB
IT Application Project Terms of Reference

Table of Contents

Terms of Reference

e-Asset Management System

1. Background

Due to the increasing number of assets owned by AIIB, the FAS department need to use an IT system to register and manage the life-cycle of the non-IT assets. The bank's definition of fixed assets is larger than $10,000. However, non-IT Assets means all non-consumable and tangible goods purchased by AIIB for its own use with a purchase value of $200 or more.

The main functions to be implemented with the e-Asset systems are the following:

a. Request of non-it assets
b. Receipt and delivery of non-it asset to user departments
c. Inventory control
d. Retirement of non-it assets
e. Reporting

2. Objective

The e-Asset system aims to bring the manual and paper-based non-IT asset management process to an integrated IT system. With the help of this IT solution, FAS department will be able to digitalize the non-IT asset management process with the following goals:

1. Have a valid IT system, which can provide clear overview of the non-IT asset situation of the Bank;
2. Manage user departments' requirements efficiently;
3. Be able to keep track of all the asset life-cycle in the system
4. Improve the daily work efficiency
5. Better compliance and control regarding non-IT asset management
6. Make Bank required report or other information.

3. Scope of work

The main functions to be implemented with the e-Asset systems are the following:

a. REQUEST OF NON-IT ASSETS：The system should be able to handle the request of non-IT asset based on AIIB's business processes, such as proper approval workflow designed by AIIB.
b. RECEIPT AND DELIVERY OF NON-IT ASSET TO USER DEPARTMENTS: The system should be able to register all the non-IT asset and keep track of the asset status and usage. Besides the typical Non-IT assets, the e-Asset system will register the artworks and the Bank's received gifts.
c. INVENTORY CONTROL: The system should be able to conduct necessary depreciation and life time calculation as well as keep track of the asset inventory status. The system should be able to conduct the relocation of Non-IT assets, reassignments of accountability, and the removal of Non-IT assets from AIIB premises as well as the loss, damage of Non-IT assets.
d. RETIREMENT OF NON-IT ASSETS: The system should be able to handle all kinds of asset retirement and disposal, such as donation, loss, trade in, and etc.
e. REPORTING: The system should be able to report based on the business requirements, such as

- report assets due for disposition, based on the scheduled disposal date and type;
- an audit record of any and all changes to assets by user ID and date-time stamp;
- disposition report showing items by asset type that have physically been disposed of but still remain on file for information purposes.
- Prepare consolidated statement of Non-IT assets for HQ and regional offices.
- Prepare other customized report as required.

Integration/interface with Bank's other departments and IT systems:

The e-Asset system need to be integrated by Bank's active directory, so the relevant employee information can be synchronized over to reduce manual master data maintenance.

4. Timeline

Requirement & Design: 2018.06 – 2018.07
Configuration & Interface development: 2018.07 – 2018.09
Test & roll out: 2018.09

5. Deliverables

With the above requirements on the main functions, we need the IT solution meeting our requirements as well as the implementation service to conduct the below activities and complete the relevant deliverables.
5.1.   Rollout Preparation
5.2.   Requirements Understanding and System Blueprint
5.3.   System Development and Testing
5.4.   UAT and Training
5.5.   Deployment and Go-live
5.6.   Post go-live support

6. Qualification and Experience Required for Potential Vendors or Experts

- The firm undertaking the assignment should have a minimum of 3 years of direct experience in the related solutions implementation.
- The team member should have equivalent professional work experience combined with knowledge and degree in the related field.
- Experience with implementing the related solutions with leading standards or frameworks.
- Experience with the system architecture and connectivity/integration of the related solutions.
- Can work well and deliver effectively without close daily supervision once the clear deliverables are set.

7. Documents Required in Your Response

7.1 Vendor's response to the functional requirements as indicated in **Section 3**.

7.2 Vendor's response to questions solution offering and capabilities. Please respond to each question in the table below. Vendors are encouraged to answer every question and provide supplementary documentations. Please provide you responses in an Excel format. Supplementary documentations can be provided in Excel, Word or PowerPoint formats.

General	
1	Detailed Company Profile
2	Detailed track records for financial institutes cases.
Functional Alignment	
3	Describe your solutions to meet language requirement (all in English).
4	Describe your solutions to meet integration requirements. This should indicate that all three solutions come from the same software product and make sure that solutions can interact through the same platform.
5	Describe the solutions offerings to support AIIB's e-reception system as per the requirements provided in Section 3.
6	Describe the solutions delivery approach to support AIIB's e-reception lifecycle e.g. one system with one database for all lifecycles, multiple systems with separate databases etc.

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Terms of Reference

E-Reception System

1. Background

To AIIB, visitor management is important and rigorous. Numerous visitors including government officials, foreign dignitaries, economists, on-site service providers and ordinary visitors enter and leave buildings continually. It is inefficient to undertake visitor management work using manual service for either staff members, receptionists or visitors, and it also poses security risks for the organization. To be specific:

- **Inefficient workflow and methods of reservation and registration.**
  Without an online system, staff have to communicate with receptionists many times for making reservations or identifying visitors. In addition, it costs time and efforts on identification and verification of each visitor, the workload will be overwhelmed for staff when a large amount of visitors arrive at the same time.

- **Limit security levels.**
  There is no tools for administrators to monitor information and status of visitors. In addition, simple identification means of registration and access make security threats exist.

- **Lack of data statistics.**
  Data recording by labor lacks efficiency and accuracy, and it is difficult to conduct data statistics and analysis.

2. Objective

AIIB aims to establish an e-reception system, to achieve the informatization of visitor management. To be specific,

1. Design a well-run workflow for visitor management and cure it to the system.
2. Achieve the automation of visitor management, improving the efficiency and accuracy.
3. Establish the connectivity of data among the software and hardware, making data visible and clear. In addition, make it easy to do data statistics.
4. Raise security levels, especially for the identity verification of registration and access. Provide information monitoring function.

3. Scope of work

E-reception system is a new-build system, to achieve the informatization of visitor management through developing software and reforming hardware simultaneously. The system is supposed to design a well-run workflow for visitor management, including reservation process, registration process and access process. There should also be a process for administration to manage and control all the three processes mentioned.

- For reservation process, the system should provide a reservation subsystem.
- For registration process, the system should provide registration devices.
- For access process, the existing turnstiles should be reformed.
- For administration process, the system should provide an administration backend.

3.1 Integration Requirements

The system should be compatible with other e-service systems such as conference room booking system, ADFS, etc. It is supposed to develop open APIs to achieve the integration.

3.2 Non-functional Requirements:

Usability
Reliability & Availability
Performance
Flexibility

4. Timeline

1. Requirement Understanding and System Customization: 2018.06 – 2018.08
2. System Development: 2018.08 – 2018.09
3. Deployment and Go-live: 2018.09

5. Deliverables

With the above requirements on the main functions, we need the IT solution meeting our requirements as well as the implementation service to conduct the below activities and complete the relevant deliverables.

    5.1. Rollout Preparation
    5.2. Requirements Understanding and System Customization
    5.3. System and Device Development
    5.4. Testing and Training
    5.5. Deployment and Go-live
    5.6. Post go-live support

6. Implementer Requirements

The implementation partner (implementer) will be responsible for end to end implementation of e-reception System for AIIB as per the business requirements specified in **Section 3** of this document. The implementing partner should have the following experience:

- The firm undertaking the assignment should have a minimum of 3 years of direct experience in the related solutions implementation.
- The team member should have equivalent professional work experience combined with knowledge and degree in the related field.
- Experience with implementing the related solutions with leading standards or frameworks.
- Experience with the system architecture and connectivity/integration of the related solutions.
- Can work well and deliver effectively without close daily supervision once the clear deliverables are set.

7. Documents Required in Your Response

7.1. Vendor's response to the business functional requirements as indicated in **Section 3**.

7.2. Vendor's response to questions solution offering and capabilities. Please respond to each question in the table below. Vendors are encouraged to answer every question and provide supplementary documentations. Please provide you responses in an Excel format. Supplementary documentations can be provided in Excel, Word or PowerPoint formats.

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5	Describe the solutions offerings to support AIIB's e-reception system as per the requirements provided in Section 3.
6	Describe the solutions delivery approach to support AIIB's e-reception lifecycle e.g. one system with one database for all lifecycles, multiple systems with separate databases etc.

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Terms of Reference

Smart-Conference

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1. Background

AIIB currently have a simple meeting room display system without meeting booking feature. The simple system is provided and AIIB take over the building and that is the reason why we are enhancing this system.

Problem Identification

- **Lack of unified meeting room management**
  Without a centralized meeting room management system in place, staff takes efforts and time to track the information of room equipment, capacity and availability to adequately meet the demand of meeting requirements.

- **Unknown meeting room status**
  Day-to-day meeting demand is chaotic, attendees come from multiple departments or organizations, making rooms' usable availability data exclusive.

- **Absent of shared calendars**
  The information of room availability should be accessible to staff at any time, therefore meetings can be arranged properly in advance.

- **Weak link to coffee/admin services**
  As a common practice and a manner of courtesy, admin/coffee/tea/water services are needed when meetings held, to build strong link to provide such services ahead of time will create best user experience.

- **Limited access to IT help**
  IT help services should be rapidly, reliable and accountable when required, otherwise meeting quality and timeline suffers, and service delivery lags.

- **No effective channels to gather feedback**
  The best way to ensure meetings appropriately scheduled and to measure the quality of services provided based upon the availability of the room resources is to gather feedback from meeting hosts and attendees.

2. Objective

AIIB is seeking to procure products and services to develop, deploy, manage and support meeting activities. AIIB is committed to increase conference management practices by contracting vendors to provide solutions that integrates meeting activities, resources and services in attractive and convenient ways. The solution must ensure that services and resources information are available to users with the appropriate access through Outlook. The goals of the meeting management solution are to:

- Manage full life cycle meeting activities

- Provide real-time room searching / booking / tracking features
- Link multiple admin resources and services with booking management,
- Gather direct feedback and improve service quality
- Collect meeting booking statistics
- Both Web and Application(Outlook) support

3. Scope of work

The main functions to be implemented with the Smart Conference system will include (but not be limited to) working with Office 365 Exchange service to manage meeting and related resources (tea room service, IT helpdesk service, etc.), sending notifications and generating reports.
The system contains an outlook add-in which integrates with Outlook to enhance the meeting management function in outlook application.
The users in this system should be categorized into several user groups Different user group can access corresponding functions. The system need to talk with multiple external systems to collaborate on meeting management.

3.1 Integration Requirements

The new system (in the black dashed box) need to integrate with Outlook Application (2016), Office 365, Zoom and Meeting Room Tablet.

It will use Office Add-in technology to integrate with Outlook Application (2016), and secure web API to integrate with other systems. Please find the interaction details in System Context and Function Architecture.

3.2 Non-functional Requirements

Usability

Reliability & Availability

Performance

Flexibility

4. Timeline

1. Requirement Understanding and System Customization: 2018.06 – 2018.08
2. System Development: 2018.08 – 2018.09
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5. Deliverables
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5.3.   System Development and Testing
5.4.   Testing and Training
5.5.   Deployment and Go-live
5.6.   Post go-live support

6. Implementer Requirements

The implementation partner (implementer) will be responsible for end to end implementation of Smart Conference System for AIIB as per the business requirements specified in **Section 3** of this document. The implementing partner should have the following experience:

- The firm undertaking the assignment should have a minimum of 3 years of direct experience in the related solutions implementation.
- The team member should have equivalent professional work experience combined with knowledge and degree in the related field.
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Annex B: Summary of Consultant Information

Firm's Name: _____

The information shall include but not limited to the following:

- Firm's basic information (base location, years of the experience, etc.)
- Firm's experience in the similar projects (name of the projects, main SOW, size, reference client names, etc.)

Note:

Basic information	Base Location	Years of the Experience	Names of three cases	Brief of information (Time, size, deliverable, etc.)	Reference Client Names[1]
			1		
			2		
			3		
Contact person:					

1.
2.