# ****Technical Specification Document****

**1. Introduction**

**Description:**  
This section introduces the purpose of the Workspace Project and sets the context for vendors. It explains that KDB Bank Uzbekistan is looking to implement a unified digital workspace combining ITSM and BPM functionalities to enhance collaboration, automation, and efficiency.

**Content:**  
KDB Bank Uzbekistan is initiating the **Workspace Project** to implement a unified **IT Service Management (ITSM)** and **Business Process Management (BPM)** platform.  
The platform will serve as a **centralized digital workspace**, connecting employees, departments, and management through one integrated system.  
It will also support **AI-driven automation, chat-based collaboration, RPA**, and **meeting management functions**, aiming to reduce manual work and improve operational transparency across the organization.

**2. Project Objectives**

**Description:**  
This section defines what the bank expects to achieve from the implementation. Vendors must ensure their proposed solution aligns with these goals.

**Content:**  
The key objectives of the Workspace Project are to:

1. Establish a single platform combining ITSM and BPM functionalities.
2. Improve efficiency and transparency across all business and IT processes.
3. Automate repetitive workflows and service requests.
4. Enable AI-powered assistance and RPA-based task execution.
5. Enhance communication and collaboration across departments.
6. Strengthen data security and regulatory compliance.
7. Build a future-ready, AI-enabled work environment.

**3. Functional Requirements**

**Description:**  
This section outlines the main system features expected from the vendor. It provides a checklist of functionalities that must be included in the proposed solution.

**3.1 ITSM (IT Service Management)**

* Incident Management (ticket creation, categorization, escalation).
* Change and Problem Management workflows.
* Service Request Management (catalog, approvals, SLA tracking).
* Asset and Configuration Management (CMDB).
* Knowledge Base and FAQ module.
* Performance dashboards (MTTR, SLA adherence, backlog analysis).

**3.2 BPM (Business Process Management)**

* Visual process designer (drag-and-drop).
* Multi-level approval workflows (HR, Finance, Operations, etc.).
* Document management with version control and audit trail.
* Integration with existing systems (core banking, HRMS, intranet).
* Real-time process analytics and reporting.
* Support for digital signatures and secure document routing.

**3.3 Collaboration & Workspace**

**Description:**  
This section defines the collaboration and communication features required for an integrated digital workspace.  
The goal is to create a unified environment where employees can chat, meet, share, and record decisions without switching tools.

**Functional Requirements:**

1. **Task and Project Management**
   * Kanban boards, Gantt charts, and task lists for project tracking.
   * Task assignment, dependencies, and automated reminders.
   * Departmental and cross-functional dashboards.
2. **Communication Tools**
   * **Text chat** for individual and group discussions.
   * **Voice chat and video call** features for real-time communication.
   * **Online meeting organization** with built-in scheduling and calendar sync.
   * **Meeting recording and transcription** functions for documentation.
   * **Automatic meeting minutes generation**, summarizing participants, decisions, and action items.
3. **Collaboration Features**
   * Shared document repository with version control and co-editing.
   * Real-time collaborative editing for Word, Excel, and presentations.
   * Commenting, tagging, and mentions for collaboration.
   * File sharing with access permissions (read/write/restricted).
4. **Workspace Customization**
   * Department-specific workspaces (IT, HR, Operations, Risk, etc.).
   * Personalized dashboards showing user tasks, meetings, and KPIs.
   * Integration with Microsoft 365, Google Workspace, or internal systems.
   * Unified notification center for updates and reminders.
5. **AI-Powered Assistance (Optional)**
   * AI summarization of meetings and chats.
   * Smart scheduling suggestions.
   * Automatic task creation from meeting notes or emails.

**Outcome:**  
A single digital workspace where employees can collaborate, communicate, hold meetings, and document outcomes securely.

**4. AI and Automation Integration**

**Description:**  
This section defines how the workspace should support AI Agents and RPA for intelligent assistance and automation.

**4.1 AI Agent**

* Integrated digital assistant that helps employees with daily operations.
* Natural language processing (Uzbek, English, Russian).
* Data-driven task recommendations based on emails, calendars, and workspace content.
* Proactive suggestions for follow-ups and scheduling.
* Secure, role-based data access.

**4.2 RPA (Robotic Process Automation)**

* Automates repetitive, rule-based workflows.
* Can be triggered by user or AI Agent.
* Includes a bot performance dashboard.
* Monitors automation success rate and errors.

**5. Technical Requirements**

**Description:**  
This section specifies the technical standards the solution must meet — including architecture, integration, scalability, and compliance.

| **Category** | **Specification** |
| --- | --- |
| **Architecture** | Modular, microservice or hybrid cloud/on-premise structure. |
| **Integration** | RESTful APIs, Webhooks, and SSO (LDAP/AD). |
| **Database** | PostgreSQL / MS SQL / Oracle (with encryption). |
| **Security** | Role-based access control, MFA, audit logs, AES-256 encryption. |
| **Scalability** | Supports 300+ concurrent users, scalable to 500+. |
| **Localization** | Multi-language interface (English, Uzbek, Russian). |
| **AI Compatibility** | Integration with OpenAI, Azure AI, or equivalent APIs. |
| **Deployment** | Linux/Windows Server compatible, containerized (Docker/Kubernetes preferred). |
| **Backup & Recovery** | Automated backup, failover, and HA support. |
| **Performance** | Average response time below 2 seconds. |
| **Compliance** | Must meet CBU and internal information security standards. |

**6. User and Role Management**

**Description:**  
This section explains how users and departments will access and control the system.

**Content:**

* Integration with Active Directory (AD) for authentication.
* Configurable roles and permissions per department.
* Role-based access to modules and data.
* Department dashboards and ownership of workflows.
* Audit trail of all user activities.

**7. Reporting & Analytics**

**Description:**  
Defines the analytical and reporting capabilities required for decision-making and system oversight.

**Content:**

* Real-time performance dashboards for ITSM and BPM.
* Drag-and-drop report builder.
* Export to Excel, PDF, or Power BI.
* SLA and KPI tracking with alerts.
* AI-generated insights (trend prediction, workload analysis).

**8. Implementation Scope**

**Description:**  
Outlines the implementation stages, duration, and expected deliverables.

| **Phase** | **Description** | **Duration** |
| --- | --- | --- |
| **Phase 1** | Contracting & Project Initiation | 2–3 weeks |
| **Phase 2** | Installation & Environment Setup | 3–4 weeks |
| **Phase 3** | Internal Data Migration | 3–5 weeks |
| **Phase 4** | Departmental Setup & Customization | 4–6 weeks |
| **Phase 5** | Staff Training & Adoption | 2–3 weeks |
| **Phase 6** | Go-live & Post-Implementation Review | 2 weeks |

**Estimated Total Duration:** 4–5 months

**9. Licensing & Support**

**Description:**  
Defines expectations regarding licensing structure and technical support.

**Content:**

* Transparent licensing model (user-based, concurrent, or enterprise).
* Minimum one-year warranty and technical support.
* Regular version updates and security patches.
* SLA for support response and issue resolution.
* Local or regional technical support preferred.

**10. Deliverables**

**Description:**  
Specifies what vendors must deliver upon project completion.

**Content:**

1. Fully functional and configured Workspace platform.
2. Integrated ITSM and BPM modules.
3. AI Agent and RPA connectivity setup.
4. Data migration and access control configuration.
5. Staff and administrator training sessions.
6. Full technical documentation and user manuals.
7. Final system performance and handover report.

**11. Evaluation Criteria**

**Description:**  
Defines how vendor proposals will be assessed.

| **Category** | **Weight** | **Evaluation Focus** |
| --- | --- | --- |
| **Technical Compliance** | 30% | Meets all specifications and functionality. |
| **Implementation Experience** | 25% | Experience in banking or enterprise-scale projects. |
| **Cost & Licensing** | 20% | Transparent, scalable pricing. |
| **Local Support & Training** | 15% | Availability of on-site or regional support. |
| **Innovation (AI/RPA)** | 10% | Modern, scalable automation and AI integration. |

**12. Contact Information**

**Description:**  
Provides communication channels for proposal submission or clarifications.

**Content:**  
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