

**REQUEST FOR PROPOSALS
FOR AN INFORMATION TECHNOLOGY
SERVICE MANAGEMENT (ITSM)
TOOL SOLUTION**

ATTACHMENT 4.2

TECHNICAL EVALUATION

v1.0

**REQUEST FOR PROPOSALS FOR AN ITSM TOOL SOLUTION
ATTACHMENT 4.2 – TECHNICAL EVALUATION**

1. Mandatory Technical Evaluation

1.1. Overview of Mandatory Technical Evaluation

1.1.1. The Bidder must include in its bid a response to each of the mandatory requirements that follows. To be declared responsive, a bid must:

- a) comply with all the requirements of the bid solicitation;
- b) meet all mandatory criteria;
- c) obtain the minimum pass mark(s) associated with the rated requirements as set out in the table below.

1.1.2. Bids not meeting (a), (b) and (c) will be declared non-responsive.

1.1.3. The following definitions apply to the evaluation criteria which follows:

Term	Definition
Customer Reference Contract	describes a contract that the Bidder held to deliver services to a customer and is used to demonstrate the Bidder's experience
Customer Reference Project	describes a customer project that the proposed resource worked on and is used to demonstrate the resource's experience

1.1.4. Bidders are strongly encouraged to identify within their bid response the location of the supporting documents or information for each mandatory requirement, by indicating in either their bid response or any provided documentation, the portions of the text (i.e. pages and paragraphs) where they have addressed the mandatory requirement.

1.1.5. If a referenced document is stored within a website, the Bidder should extract and include this information either within your response or attached the documentation. As per Section 1.8 of SSC's Standard Instructions, web links are not permitted and will not be considered by evaluators.

1.2. Mandatory 1 (M-1) – Bidder’s Core Team

Mandatory Criteria	Bidder Response
<p>M1 (a) - The Bidder must identify its Core Team by providing the name of the Prime Contractor and a list of all sub-contractor organization(s).</p> <p>Note: Sub-contractor organizations do not include individual independent contractor resources proposed to fulfill Contractor Project Management Team or Contractor Work Team roles.</p>	
<p>M1 (b) - The Bidder’s bid submission must describe the proposed high-level role and responsibilities of each member of the Core Team identified in M1 (a) with respect to fulfilling the requirements described in Annex A - Statement of Work (SOW). To be considered compliant, the provided description needs to include (but is not limited to) the following sections of Annex A:</p> <ul style="list-style-type: none"> (i) IM/IT Professional Services (including Annex A - SOW sections 2, 4-9,11 and 12); (ii) Training services (Annex A - SOW section 10); (iii) Application Management Support (Annex A - SOW section 13); and (iv) ITSM Tool Software (Annex A - SOW section 3). 	

1.3. M-2 Corporate Experience, ITSM Tool Software Configuration and Implementation

1.3.1. The Bidder must demonstrate their Corporate Experience configuring and implementing the ITSM Tool Software by providing two (2) Customer Reference Contracts in which the Bidder gained experience in the configuration and implementation of the proposed ITSM Tool Software.

1.3.2. To be compliant, **each** Customer Reference Contracts provided **must**:

- i) Have been delivered by the same Core Team Member proposed to lead the delivery of the ITSM Tool Implementation and Integration services for SSC (as described in Annex A – SOW Sections 2, 4-9, 11 and 12);
- ii) Have been completed within five years preceding the issuance date of this RFP, or if still ongoing the Customer Reference Contract must have been in place for a minimum of twelve months preceding the issuance date of this RFP;
- iii) Have billed a minimum of \$6M (Canadian, including taxes) in professional services under the Customer Reference Contract as of the issuance date of this RFP; and
- iv) Included completion, as of the issuance date of this RFP, of the following:
 - a. Development of the Detailed Design;
 - b. Configuration of the proposed ITSM software to support at least five ITSM processes; and
 - c. Interfaces to other corporate systems including, at a minimum:
 - i) Lightweight Directory Access Protocol (LDAP) repository, or
 - ii) Financial system (e.g. SAP).

1.3.3. The Bidder should complete the Bidder Response Table that follows for each Reference Contract.

M-2 - Customer Reference Contract #1:

Submission Requirement	Bidder Response
1) Client Particulars: <ol style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
2) Identify the Core Team Member that delivered the services under the referenced contract.	
3) Identify the version of the ITSM Tool COTS software implemented including a list of modules implemented as applicable.	
4) Provide an overview of the project and the work associated with the configuration and implementation of the ITSM Tool COTS software, including demonstration that the following deliverables were completed: <ol style="list-style-type: none"> a. Development of the Detailed Design; b. Configuration of the proposed ITSM software to support at least five ITSM processes; and c. Interfaces to other corporate systems including, at a minimum: <ol style="list-style-type: none"> i) Lightweight Directory Access Protocol (LDAP) repository, <u>or</u> ii) Financial system (e.g. SAP). 	
5) Specify contract start and end date (mm/yyyy to mm/yyyy)	

6) Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.

M-2 - Customer Reference Contract #2:

Submission Requirement	Bidder Response
1) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
2) Identify the Core Team Member that delivered the services under the referenced contract.	
3) Identify the version of the ITSM Tool COTS software implemented including a list of modules implemented as applicable.	
4) Provide an overview of the project and the work associated with the configuration and implementation of the ITSM Tool COTS software, including demonstration that the following deliverables were completed: <ul style="list-style-type: none"> d. Development of the Detailed Design; e. Configuration of the proposed ITSM software to support at least five ITSM processes; and f. Interfaces to other corporate systems including, at a minimum: <ul style="list-style-type: none"> iii) Lightweight Directory Access Protocol (LDAP) repository, <u>or</u> iv) Financial system (e.g. SAP). 	
5) Specify contract start and end date (mm/yyyy to mm/yyyy)	
6) Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.	

1.4. M-3 Corporate References, ITSM Tool Software

1.4.1. The Bidder must provide three Customer Reference Projects from the Software Publisher that demonstrate the maturity of the proposed ITSM Tool software.

1.4.2. To be compliant, **each** of the three Customer Reference Projects provided **must**:

- i) Have been deployed to production and accepted by the client within five years preceding the issuance date of this RFP;
- ii) Have been deployed to support an organization with a minimum of 3,000 employees; and
- iii) The COTS Software Publisher (ITSM Tool) delivered ongoing software maintenance and support services for the ITSM Tool software on a monthly or annual contract basis and included, at a minimum, the following services:
 - a. COTS Software Product Updates;
 - b. Notice of Correction and Defaults; and
 - c. Telephone Support.

And, where at least one of the three reference projects:

- i) Was deployed to support a large scale organization with a minimum of 100,000 employees (although not all 100,000 employees will have a need to use the ITSM software); and
- ii) Was deployed as part of a bilingual implementation (i.e. any two languages).

1.4.3. The Bidder should complete the Bidder Response Table that follows for each Reference Contract.

M-3 - Customer Reference Contract #1:

Submission Requirement	Bidder Response
1) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
2) Identify the version of the ITSM Tool COTS software implemented including a list of modules implemented as applicable.	
3) Identify the number of employees supported by the ITSM Tool	
4) Identify if the implementation supports two or more languages, and if so, which languages.	
5) Specify the date the ITSM Tool was deployed to production and accepted by the client (mm/yyyy)	
6) Detail the ongoing software maintenance and support services provided by the COTS Software Publisher in support of the OTSM Tool software, including demonstration that the following monthly services were provided: <ul style="list-style-type: none"> a. COTS Software Product Updates; 	

- b. Notice of Correction and Defaults; and
- c. Telephone Support

M-3 - Customer Reference Contract #2:

Submission Requirement	Bidder Response
1) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
2) Identify the version of the ITSM Tool COTS software implemented including a list of modules implemented as applicable.	
3) Identify the number of employees supported by the ITSM Tool	
4) Identify if the implementation supports two or more languages, and if so, which languages.	
5) Specify the date the ITSM Tool was deployed to production and accepted by the client (mm/yyyy)	
6) Detail the ongoing software maintenance and support services provided by the COTS Software Publisher in support of the OTSM Tool software, including demonstration that the following monthly services were provided: <ul style="list-style-type: none"> a. COTS Software Product Updates; b. Notice of Correction and Defaults; and c. Telephone Support 	

M-3 - Customer Reference Contract #3:

Submission Requirement	Bidder Response
1) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
2) Identify the version of the ITSM Tool COTS software implemented including a list of modules implemented as applicable.	
3) Identify the number of employees supported by the ITSM Tool	
4) Identify if the implementation supports two or more languages, and if so, which languages.	
5) Specify the date the ITSM Tool was deployed to production and accepted by the client (mm/yyyy)	
6) Detail the ongoing software maintenance and support services provided by the COTS Software Publisher in support of the OTSM Tool software, including demonstration that the following monthly services were provided: <ul style="list-style-type: none"> a. COTS Software Product Updates; b. Notice of Correction and Defaults; and c. Telephone Support 	

1.5. M-4 Infrastructure Capacity Specifications

Reference: Annex A - SOW section 4

- 1.5.1. The Bidder must provide the specifications for the infrastructure capacity to be provided by SSC, for the Development and Testing environments.

Mandatory Criteria	Bidder Response
<p>The infrastructure capacity specifications must include the requirements set out in section 4.1 b) of Annex A - SOW.</p> <p>The specifications for the Development environment must be of adequate capacity to support the minimum number of Users and Volumetric Data for SSC and the first Tenant department as described in sections 2.4 and 2.5 of Attachment 1 (ITSM Project Background Information and Context).</p> <p>Note: SSC may require that the top-ranked bidder participate in a working session with SSC to validate and confirm the specifications provided to allow SSC to initiate procurement and installation of the required infrastructure.</p>	<p><i>Bidder to insert cross-reference to where the required document is contained in the bid response.</i></p>

1.6. M-5 Detailed Work Plan for Contractor Onboarding

Reference: Annex A - SOW section 5

- 1.6.1. The Bidder must provide a Detailed Work Plan for the work to be conducted within 90- days of Contract Award, as set out in Annex A - SOW section 5, Contractor Onboarding, and in accordance with the firm fixed cost specified in the Bidder's Financial Proposal for the Contractor Onboarding work.

Mandatory Criteria	Bidder Response
<p>The Detailed Work Plan for Contractor Onboarding should include:</p> <ul style="list-style-type: none"> a) A narrative description of the approach that the Bidder proposes to utilize to initiate the project and develop a mutually acceptable detailed Contractor Work Plan and Schedule for the ITSM Project (It is suggested that this narrative description does not exceed 4 pages); b) Work Breakdown Structure (WBS) which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 5 of Annex A - SOW; c) Proposed schedule, in Microsoft Project, including milestones and interdependencies; d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identifies the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of SSC to meet the plan, e.g. access to specific SSC Project staff, additional documentation beyond that listed in Annex A - SOW section 5). 	<p><i>Bidder to insert cross-reference to where the required document is contained in the bid response.</i></p>

1.7. M-6 Detailed Work Plan for Development of Transition Out Plan

Reference: Annex A - SOW section 12.1

- 1.7.1. The Bidder must provide a Detailed Work Plan for the development of the Transition Out Plan as set-out in section 12.1 of Annex A, SOW. The Work Plan must reflect the firm fixed cost specified in the Bidder's Financial Proposal for development of the Transition Out Plan.

Mandatory Criteria	Bidder Response
<p>The Detailed Work Plan for Transition Out should include:</p> <ul style="list-style-type: none"> a) A narrative description of the approach that the Bidder proposes to utilize to develop the Transition Out Plan in collaboration with SSC. (It is suggested that this narrative description does not exceed 4 pages); b) Work Breakdown Structure (WBS) which identifies the tasks and activities the Bidder proposes to conduct to complete each deliverable identified in section 12.1 of Annex A - SOW; c) Proposed schedule, in Microsoft Project, including milestones and interdependencies; d) Resource plan which details the Bidder's personnel required to complete the deliverables, including the level of effort (LOE) (in days) by individual resource. The resource plan must clearly identified the proposed LOE of Contractor's Core Delivery Team resources proposed in response to requirement #M-12 and the Contractor Project Management Team resources versus other additional resources the Bidder deems necessary to complete Contractor Onboarding; and e) Dependencies required from SSC, after contract award, to enable the delivery of the required work (i.e. requirements of SSC to meet the plan). 	<p><i>Bidder to insert cross-reference to where the required document is contained in the bid response.</i></p>

1.8. M-7 Contractor Governance Structure

Reference: Annex A - SOW section 2.1

1.8.1. The Bidder must provide a high level description detailing how it proposes to organize itself to manage and deliver the requirements set-out in Annex A - Statement of Work (SOW).

1.8.2. The Bidder's response must include:

Mandatory Criteria	Bidder Response
<p>a) A Project Organization chart depicting its proposed Contractor Governance Structure as stipulated in Annex A - SOW, Section 2.1. The organization chart should clearly identify key positions; the positions which are designated to interface between the Contractor's organization and SSC's Governance Structure; and the name of individuals proposed to fulfill such positions during the Contract.</p>	<p><i>Bidder to insert cross-reference to where the required document is contained in the bid response.</i></p>
<p>b) A description of the governance model the Bidder proposes to use to manage the Work to be delivered under the Contract, including the Work performed by its sub-contractors. The proposed model should address the Bidder's internal processes for managing escalation and resolution of issues and disputes between the Bidder and its sub-contractors, as well as between the Bidder and SSC.</p>	

1.9. M-8 Contractor Project Management Team

Reference: Annex A - SOW sections 2.2 and 2.3 d) a. & d.

- 1.9.1. Using the Resource Job Categories set out under Section 2.12 of Annex A - SOW, the Bidder must propose a Project Management Team to deliver the Project Management and Oversight function stipulated under section 2.2 of Annex A - SOW for the initial 24 month period of the Contract. The Bidder's response must include, but not be limited to:

Mandatory Criteria	Bidder Response
a) Identification of the individual proposed to fulfill the role of Contractor PM (Note: The Contractor PM will be further evaluated in M-9 below);	
b) The number of resources under its proposed Contractor Project Management Team, broken down by Resource Job Category;	
c) The associated percentage of each proposed resources time that will be dedicated to the Contractor Project Management Team; and	
d) A brief description of the role that each proposed resource will provide as part of the Contractor Project Management Team.	

Note: The proposed Contractor Project Management Team must reflect the firm monthly fee, for the initial 24 months of the contract, as specified in the Bidder's Financial Proposal. Subsequent TA(s) will be issued for ongoing Project Management work.

1.10. M-9 Proposed Key Resources

Reference: Annex A - SOW sections 2.1, 2.3, 2.12.1, 2.12.4 and 2.12.5

- 1.10.1. As stated in the Annex A - SOW, the composition of the Contractor's Work Team, and the level of effort associated with each resource for each associated TA may differ during the performance of each specific TA under the Contract (Refer to Annex A - SOW article 2.3 for additional details regarding the Contractor's Work Team requirements).
- 1.10.2. The Bidder must propose a qualified resource to fulfill each of the following Contractor Work Team roles:
- Contractor Project Manager;
 - Solution / Application Architect; and
 - Integration Specialist.
- 1.10.3. The Bidder should fully complete the tables below (as applicable) for each of the three proposed resources. Résumés are not required for the proposed resources.

1.10.4. **M-9.1 Proposed Contractor Project Manager**

The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Contractor PM resource managed and delivered an enterprise-wide IM/IT business transformation project utilizing one or more COTS products.

For each Customer Reference Project to be considered:

- The Customer Reference Project must have had a minimum budget of \$6,000,000. (Canadian including taxes);
- The Customer Reference Project must have been under the direct management of the proposed Contractor Project Manager resource; and
- The proposed Contractor Project Manager resource must have provided the project management services to the Customer Reference Project for a minimum duration of twelve months within the five years preceding the issuance date of this RFP.

Mandatory Criteria	Bidder Response
Name of Proposed Contractor Project Manager:	
Reference Project #1	
a) Client Particulars: <ol style="list-style-type: none"> Client Organization Name Address Contract or Purchase Order Number Project Title Client Contact Name and Title Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	

c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed Contractor PM resource directly managed and delivered an enterprise-wide IM/IT business transformation project utilizing one or more COTS products.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>
Reference Project #2	
a) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed Contractor PM resource directly managed and delivered an enterprise-wide IM/IT business transformation project utilizing one or more COTS products.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>

1.10.5. M-9.2 Proposed Solution / Application Architect

The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Solution / Application Architect resource developed the logical architecture for an implementation of the proposed ITSM Tool software.

For each Customer Reference Project to be considered:

- i. The logical architecture included traceability from the Business Requirements and Non-Functional Requirements to the Solution Architecture;
- ii. The system development component of the overall Customer Reference Project budget must have been a minimum of \$6,000,000. (Canadian including taxes); and
- iii. The proposed Solution / Application Architect resource must have provided the architecture services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP.

Mandatory Criteria	Bidder Response
Name of Proposed Solution / Application Architect:	
Reference Project #1	
a) Client Particulars: <ol style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Identify the version of the proposed ITSM Tool that was implemented.	
e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource developed the logical architecture for an implementation of the proposed ITSM Tool software; including traceability from the Business Requirements and Non-Functional Requirements to the Solution Architecture	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>
Reference Project #2	
a) Client Particulars: <ol style="list-style-type: none"> a. Client Organization Name 	

<ul style="list-style-type: none"> b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
<p>b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)</p>	
<p>c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)</p>	
<p>d) Identify the version of the proposed ITSM Tool that was implemented.</p>	
<p>e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource developed the logical architecture for an implementation of the proposed ITSM Tool software; including traceability from the Business Requirements and Non-Functional Requirements to the Solution Architecture</p>	<p><i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i></p>

1.10.6. M-9.3 Proposed Integration Specialist

M-9.3 Proposed Integration Specialist	
Name of Proposed Integration Specialist:	
M-9.3.1	
<p>The Bidder must provide two Customer Reference Projects which demonstrate that the proposed Integration Specialist resource has:</p> <ul style="list-style-type: none"> a) identified the source systems; b) designed the integration solution; and c) implemented the integration solution <p>to implement automated Data Feeds that provide the ITSM application with the foundational data (e.g. employees, Corporate locations, etc.) to support the ITSM process.</p> <p>For each Customer Reference Project to be considered:</p> <ul style="list-style-type: none"> i. The system development component of the overall Customer Reference Project budget must have been a minimum of \$2,000,000. (Canadian including taxes); and ii. The proposed Integration Specialist resource must have provided the integration services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP. 	
Mandatory Criteria	Bidder Response
Reference Project #1	
a) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Identify the version of the proposed ITSM Tool that was implemented.	
e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource experience meets the requirement.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>
Reference Project #2	
a) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	

M-9.3 Proposed Integration Specialist	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Identify the version of the proposed ITSM Tool that was implemented.	
e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource experience meets the requirement.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>

M-9.3.2	
<p>The Bidder must provide Customer Reference Projects which demonstrate that the proposed Integration Specialist resource has to developed and implemented an interface mechanism between the proposed ITSM Tool software and each of the following systems:</p> <ul style="list-style-type: none"> a) ERP system (e.g. SAP, PeopleSoft); b) Directory Services; c) CMDB data source (e.g. Discovery, Operational Management tools). <p>Separate projects may be used to demonstrate integration with each system</p> <p>For each Customer Reference Project to be considered:</p> <ul style="list-style-type: none"> i. The system development component of the overall Customer Reference Project budget must have been a minimum of \$2,000,000. (Canadian including taxes); and ii. The proposed Integration Specialist resource must have provided the integration services to the Customer Reference Project for a minimum duration of six months within the five years preceding the issuance date of this RFP. 	
Mandatory Criteria	Bidder Response
Name of Proposed Integration Specialist:	
M-9.3.2	
Reference Project #1	
a) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Identify the version of the proposed ITSM Tool that was implemented.	

M-9.3.2	
e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource experience meets the requirement.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>
Reference Project #2	
a) Client Particulars: <ul style="list-style-type: none"> a. Client Organization Name b. Address c. Contract or Purchase Order Number d. Project Title e. Client Contact Name and Title f. Contact telephone number and/or e-mail address 	
b) Specify the approved budget for the Reference Project (Canadian \$ including taxes)	
c) Specify the start and end dates of the proposed resource on the referenced project (mm/yyyy to mm/yyyy)	
d) Identify the version of the proposed ITSM Tool that was implemented.	
e) Provide a description of the Reference Project, as well as the resource's role on the project, that demonstrates that the proposed resource experience meets the requirement.	<i>The project description should include context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).</i>

1.11. M-10 Proposed ITSM Tool Software

Reference: Annex A - SOW section 3.1 and Appendices 1 and 2.

Mandatory Criteria	Bidder Response
<p>a) The Bidder must identify the ITSM Tool software product, including the currently available version number, proposed to meet the Non-Functional and Functional Requirements set out in Appendices 1 and 2, respectively, to Annex A - SOW.</p>	
<p>b) The Bidder must respond to each of the Functional Requirements for the ITSM Tool using the Functional Requirements Mandatory Response form (Table #1) attached to this document.</p> <p>The Bidder's response must include reference to substantiating product documentation. Compliance with any or all Functional Requirements is subject to validation prior to contract award at the sole discretion of SSC.</p>	<p><i>Bidder to insert cross-reference to where the required document is contained in the bid response.</i></p>

2. Point-Rated Technical Evaluation

2.1. Overview of Point-Rated Technical Evaluation

- 2.1.1. Each point rated technical criterion should be addressed separately. The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient.
- 2.1.2. Points will be awarded based on the Point Allocation specified for each rated requirement that follows; there are no partial points.
- 2.1.3. The Rated Technical Evaluation Score will be calculated as follows:
- The Rated Criteria scores will each be weighted according to the table below.
 - The Weighted Scores will be added together to form the Total Score.
 - The Total Score will be weighted to form the Written Proposal Score.
 - The minimum weighted scores have been rounded. Bidder's actual scores will be calculated and rounded to two decimal places.

2.2. R-1 Customer Reference Contracts, ITSM Tool Software Configuration and Implementation

R-1 Customer Reference Contracts, ITSM Tool Software Configuration and Implementation				
The Bidder should demonstrate that each of the two Customer Reference Contracts (provided in response to mandatory criteria #M-2 Corporate Experience, ITSM Tool Software Configuration and Implementation) meets the point-rated criteria identified in the table below.				
<u>Points Available:</u> 200 (100 per Customer Reference Contract)				
Item #	Point Rated Criteria	Max Points	Point Allocation	Bidder Response
Customer Reference Contract #1 (Insert name of Client Organization from M-2)				
R-1.1	The Bidder should specify the total amount billed (Canadian, including taxes) for professional under the Customer Reference Contract for professional services associated	10	<ul style="list-style-type: none"> 10 points - Over \$12,000k 8 points - \$9,000k to \$11,999k 5 points - \$6,000k to \$8,999k 	

R-1 Customer Reference Contracts, ITSM Tool Software Configuration and Implementation				
	with the implementation of the ITSM.			
R-1.2	<p>The Bidder should demonstrate that the solution was implemented under the Customer Reference Contract was to support a complex environment, measured in terms of :</p> <p>a) The number of employees; the solution supports;</p> <p>b) The number of geographical locations supported; and</p> <p>c) If the client is an IT Service Provider.</p>	25	<p>Up to 20 points as follows:</p> <p>a) Number of employees:</p> <ul style="list-style-type: none"> • 10 points - Over 100,000 employees; • 8 points - 50,000 to 99,999 employees; • 5 points - 5,000 to 49,999 employees; or • 1 point - 3,000 to 5,000 employees. <p>b) Number of geographical locations:</p> <ul style="list-style-type: none"> • 10 points - Over 100 geographical locations supported locations; • 8 points – 11 to 99 geographical locations supported locations; or • 5 points - Up to 10 geographical locations supported locations. <p>c) IT Service Provider:</p> <ul style="list-style-type: none"> • 5 points – Yes, the client is an IT Service Provider. 	
R-1.3	<p>The Bidder should demonstrate that the work delivered under the Customer Reference Contract included integration of the proposed ITSM Tool software with other applications including:</p> <p>1) SAP Financial system</p>	20	<p>Up to 20 points will be awarded for integration of the proposed ITSM with other applications as follows:</p> <ul style="list-style-type: none"> • 5 points - SAP Financial System • 5 points - Other ITSM Tools by means of an API • 5 points - Active Directory • 5 points - Discovery Tool for Asset Management 	

R-1 Customer Reference Contracts, ITSM Tool Software Configuration and Implementation				
	2) Other ITSM Tools by means of an application programming interface (API) 3) Active Directory 4) Discovery Tool for Asset Management			
R-1.4	The Bidder should demonstrate that the work delivered under the Customer Reference Contract included data migration and reconciliation.	10	<ul style="list-style-type: none"> • 10 points - Yes • 0 points - No 	•
R-1.5	The Bidder should demonstrate that that the work delivered under the Customer Reference Contract included Application Management Support (AMS) services, for a minimum of six months.	11	Up to 11 points will be awarded as follows: <ul style="list-style-type: none"> • 6 points - Included AMS services, for a minimum of six months; and • 5points - If AMS services were provided from a Canadian Operations Centre location. 	
R-1.6	The Bidder should demonstrate that the work delivered under the Customer Reference Contract included configuration of the following ITSM processes: <ol style="list-style-type: none"> 1) Service Asset Configuration Management including CMDB design 2) Incident Management 3) Request Fulfillment 4) Change Management 	24	Up to 12 points will be awarded as follows: <ul style="list-style-type: none"> • 3 points – Service Asset Configuration Management including CMDB design • 3 points – Incident Management • 3 points – Request Fulfillment • 3 points – Change Management <p>Bonus points - If maximum (12) points were awarded above, additional points will be awarded as follows:</p>	

R-1 Customer Reference Contracts, ITSM Tool Software Configuration and Implementation			
	5) Service Catalogue Management including Service Catalogue design 6) Service Level Management 7) Event Management 8) Knowledge Management 9) Problem Management 10) Release and Deployment Management		<ul style="list-style-type: none"> • 2 points – Service Catalogue Management including Service Catalogue design • 2 points – Service Level Management • 2 points – Event Management • 2 points – Knowledge Management • 2 points – Problem Management • 2 points – Release and Deployment Management
Total Points - Customer Reference Contract #1		100	

Customer Reference Contract #2 (Insert name of Client Organization from M-2)			
R-1.7	The Bidder should specify the total amount billed (Canadian, including taxes) for professional under the Customer Reference Contract for professional services associated with the implementation of the ITSM.	10	<ul style="list-style-type: none"> • 10 points - Over \$12,000k • 8 points - \$9,000k to \$11,999k • 5 points - \$6,000k to \$8,999k
R-1.8	<p>The Bidder should demonstrate that the solution was implemented under the Customer Reference Contract was to support a complex environment, measured in terms of:</p> <p>a) The number of employees; the solution supports;</p> <p>b) The number of geographical locations supported; and</p> <p>c) If the client is an IT Service Provider.</p>	25	<p>Up to 25 points as follows:</p> <p>a) Number of employees:</p> <ul style="list-style-type: none"> • 10 points - Over 100,000 employees; • 8 points - 50,000 to 99,999 employees; • 5 points - 5,000 to 49,999 employees; or • 1 point - 3,000 to 5,000 employees. <p>b) Number of geographical locations:</p> <ul style="list-style-type: none"> • 10 points - Over 100 geographical locations supported locations; • 8 points – 11 to 99 geographical locations supported locations; or • 5 points - Up to 10 geographical locations supported locations. <p>c) IT Service Provider:</p> <ul style="list-style-type: none"> • 5 points – Yes, the client is an IT Service Provider.

R-1.9	<p>The Bidder should demonstrate that the work delivered under the Customer Reference Contract included integration of the proposed ITSM Tool software with other applications including:</p> <ol style="list-style-type: none"> 1) SAP Financial system 2) Other ITSM Tools by means of an application programming interface (API) 3) Active Directory 4) Discovery Tool for Asset Management 	20	<p>Up to 20 points will be awarded for integration of the proposed ITSM with other applications as follows:</p> <ul style="list-style-type: none"> • 5 points - SAP Financial System • 5 points - Other ITSM Tools by means of an API • 5 points - Active Directory • 5 points - Discovery Tool for Asset Management 	
R-1.10	<p>The Bidder should demonstrate that the work delivered under the Customer Reference Contract included data migration and reconciliation.</p>	10	<ul style="list-style-type: none"> • 10 points – Yes • 0 points - No 	
R-1.11	<p>The Bidder should demonstrate that that the work delivered under the Customer Reference Contract included Application Management Support (AMS) services, for a minimum of six months.</p>	11	<p>Up to 11 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 6 points - Included AMS services, for a minimum of six months; and • 5points - If AMS services were provided from a Canadian Operations Centre location. 	
R-1.12	<p>The Bidder should demonstrate that the work delivered under the Customer Reference Contract included configuration of the following ITSM processes:</p>	24	<p>Up to 12 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 3 points – Service Asset Configuration Management including CMDB design • 3 points – Incident Management • 3 points – Request Fulfillment 	

	<ol style="list-style-type: none"> 1) Service Asset Configuration Management including CMDB design 2) Incident Management 3) Request Fulfillment 4) Change Management 5) Service Catalogue Management including Service Catalogue design 6) Service Level Management 7) Event Management 8) Knowledge Management 9) Problem Management 10) Release and Deployment Management 		<ul style="list-style-type: none"> • 3 points – Change Management <p>Bonus points - If maximum (12) points were awarded above, additional points will be awarded as follows:</p> <ul style="list-style-type: none"> • 2 points – Service Catalogue Management including Service Catalogue design • 2 points – Service Level Management • 2 points – Event Management • 2 points – Knowledge Management • 2 points – Problem Management • 2 points – Release and Deployment Management 	
	Total Points - Customer Reference Contract #2	100		
	Total	200		

2.3. R-2 Customer Reference Projects, ITSM Tool Software

R-2 Customer Reference Projects, ITSM Tool Software				
<p>The Bidder should demonstrate that each of the three Customer Reference Projects (provided in response to mandatory criteria #M-3 Corporate References, ITSM Tool Software) meets the point-rated criteria identified in the table below.</p> <p><u>Points Available:</u> 150 (50 per Customer Reference Project)</p>				
Item #	Point Rated Criteria	Max Points	Point Allocation	Bidder Response
Customer Reference Project #1 (Insert name of Client Organization from M-3)				
R-2.1	The Customer Reference Project was deployed to support an IT Service Provider supporting multiple external customer organizations.	15	<ul style="list-style-type: none"> 15 points – Requirement demonstrated 	
R-2.2	The Customer Reference Project was deployed to support multiple tenants supported on a single instance of the ITSM Tool software.	15	<ul style="list-style-type: none"> 15 points – Requirement demonstrated 	
R-2.3	The Customer Reference Project was deployed to in excess of 3,000 employees.	10	<p>Up to 10 points as follows:</p> <ul style="list-style-type: none"> 10 points - Over 100,000 employees; 8 points - 50,000 to 99,999 employees; 5 points - 5,000 to 49,999 employees; or 1 point - 3,000 to 5,000 employees. 	
R-2.4	A bilingual implementation was deployed under the Customer Reference Project.	10	<ul style="list-style-type: none"> 10 points – Bilingual implementation (Canadian French and Canadian English); or 5 points – Bilingual implementation (any 2 languages) 	

R-2 Customer Reference Projects, ITSM Tool Software			
Total Points - Customer Reference Contract #1		50	
Customer Reference Project #2 (Insert name of Client Organization from M-3)			
R-2.5	The Customer Reference Project was deployed to support an IT Service Provider supporting multiple external customer organizations.	15	<ul style="list-style-type: none"> • 15 points – Requirement demonstrated
R-2.6	The Customer Reference Project was deployed to support multiple tenants supported on a single instance of the ITSM Tool software.	15	<ul style="list-style-type: none"> • 15 points – Requirement demonstrated
R-2.7	The Customer Reference Project was deployed to in excess of 3,000 employees.	10	Up to 10 points as follows: <ul style="list-style-type: none"> • 10 points - Over 100,000 employees; • 8 points - 50,000 to 99,999 employees; • 5 points - 5,000 to 49,999 employees; or • 1 point - 3,000 to 5,000 employees.
R-2.8	A bilingual implementation was deployed under the Customer Reference Project.	10	<ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and Canadian English); or • 5 points – Bilingual implementation (any 2 languages)
Total Points - Customer Reference Contract #2		50	

Customer Reference Project #3 (Insert name of Client Organization from M-3)			
R-2.9	The Customer Reference Project was deployed to support an IT Service Provider supporting multiple external customer organizations.	15	<ul style="list-style-type: none"> • 15 points – Requirement demonstrated
R-2.10	The Customer Reference Project was deployed to support multiple tenants supported on a single instance of the ITSM Tool software.	15	<ul style="list-style-type: none"> • 15 points – Requirement demonstrated
R-2.11	The Customer Reference Project was deployed to in excess of 3,000 employees.	10	Up to 10 points as follows: <ul style="list-style-type: none"> • 10 points - Over 100,000 employees; • 8 points - 50,000 to 99,999 employees; • 5 points - 5,000 to 49,999 employees; or • 1 point - 3,000 to 5,000 employees.
R-2.12	A bilingual implementation was deployed under the Customer Reference Project.	10	<ul style="list-style-type: none"> • 10 points – Bilingual implementation (Canadian French and Canadian English); or • 5 points – Bilingual implementation (any 2 languages)
Total Points - Customer Reference Contract #3		50	
Total Maximum Points		150	

2.4. R-3 ITSM Tool Software Implementation Partners

R-3 ITSM Tool Software Implementation Partners		
The Bidder should demonstrate that the ITSM Tool Software Publisher has local implementation and support Partners in Canada. Points available: 50		
Max Points	Point Allocation	Bidder Response
50	<ul style="list-style-type: none"> 10 points - per partner organization located in Canada (to a maximum of 5). 	
50	Total Maximum Points	

2.5. R-4 Customer Care Programs

R-4 Customer Care Program		
<p>The Bidder should describe the ITSM Tool Software Publisher's established customer care, advocacy and/or other formal programs, specifically related to the proposed ITSM Tool, as they relate to customer satisfaction with the product and the Software Publisher's use of such programs to improve its product direction, offering and support.</p> <p>Points available: 100</p>		
Max Points	Point Allocation	Bidder Response
100	<p>The proposed Detailed Work Plan will be evaluated based on the extent to which the response demonstrates the following attributes:</p> <ol style="list-style-type: none"> 1) Information provided is concise 2) Information provided is easy to understand 3) Demonstrates an established and robust Customer Care Program specifically related to the proposed ITSM Tool 4) Demonstrates an established and robust Advocacy Program (e.g. User Groups, Customer Community programs) specifically related to the proposed ITSM Tool 5) Demonstrates other established programs or mechanisms to enable two-way communications with existing customers; 6) Program in place to inform customers of planned product enhancements related to the proposed ITSM Tool 7) Program in place to solicit customer input to future product directions specifically related to the proposed ITSM Tool 8) The Software Publisher utilizes established programs to improve its product direction, offering and support 9) Provides unique approaches and/or solution to address SSC's target objectives for the ITSM Project <p>Point will be awarded as</p> <ul style="list-style-type: none"> • 100 points – Excellent: The Detailed Work Plan demonstrates all 9 attributes; 	

R-4 Customer Care Program		
	<ul style="list-style-type: none"> • 75 points – Very Good: The Detailed Work Plan demonstrates at least 7 out of 9 attributes; • 50 points – Acceptable: The Detailed Work Plan demonstrates at least 5 out of 9 attributes; • 0 points – Unacceptable: The Detailed Work Plan demonstrates four or fewer attributes. 	
100	Total Maximum Points	

2.6. R-5 Proposed SDLC

R-5 Proposed SDLC		
<p><u>Reference:</u> Annex A - SOW section 7.7.1</p> <p>The Bidder should describe its proposed Software Development Life Cycle. The description should include, but is not limited to, the following information:</p> <ul style="list-style-type: none"> • The SLDLC the Bidder proposes to use and the source of the methodology (i.e. proprietary or from Software Publisher); • The typical stages or steps in the proposed SDLC; • The Bidder's approach to Configuration management of the ITSM environments; • The Bidder's approach to storing and managing the configuration packages for release; and • Identification of the Toolset (if applicable) that will be utilized to support the SDLC process and the benefit of the toolset; and • How the proposed SLDLC will minimize risk to SSC's ITSM environment. <p><u>Points available:</u>100</p>		
Max. Points	Point Allocation	Bidder Response
100	<p>The proposed SDLC will be evaluated based on the extent to which the response demonstrates the following attributes:</p> <ol style="list-style-type: none"> 1) Provides all requested information 2) Information provided is concise 3) Information provided is easy to understand 4) Includes a sufficient level of detail to the major activity level 5) Demonstrates an approach to Configuration management that will adequately support the ITSM Project 6) Demonstrates an approach to storing and managing the configuration packages for release that will adequately support the ITSM Project 7) Includes a Toolset that clearly add value to support the SDLC process 8) Demonstrates that the proposed SDLC will mitigate risk that's are specific to the ITSM Project (rather than generic risks) 9) Provides unique approaches and/or solution to address SSC's target objectives for the ITSM Project 	

R-5 Proposed SDLC	
	<p>Point will be awarded as</p> <ul style="list-style-type: none"> • 100 points – Excellent: The proposed SDLC demonstrates all 8 attributes; • 75 points – Very Good: The proposed SDLC demonstrates at least 6 out of 8 attributes; • 50 points – Acceptable: The proposed SDLC demonstrates at least 4 out of 8 attributes; or • 0 points – Unacceptable: The proposed SDLC demonstrates three or fewer attributes.
100	Total Maximum Points

2.7. R-6 Detailed Work Plan for Contractor Onboarding

R-6 Detailed Work Plan for Contractor Onboarding		
<p>The Bidder's response to mandatory criteria #M-5, Detailed Work Plan for Contractor Onboarding, will be further evaluated as detailed below. <u>Points available:</u> 100</p>		
Max. Points	Point Allocation	Bidder Response
100	<p>The proposed Detailed Work Plan will be evaluated based on the extent to which the response demonstrates the following attributes:</p> <ol style="list-style-type: none"> 1) Provides all requested information 2) Information provided is concise 3) Information provided is easy to understand 4) Demonstrates an understanding of the complexity of the ITSM Project 5) Includes a sufficient level of detail to the task level 6) Is distinct and specific to the ITSM Project rather than generic template or boilerplate 7) Includes all required deliverables as specified in Annex A - SOW 8) Clearly identifies the interdependencies of SSC and the associated timings 9) Provides unique approaches and/or solution to address SSC's target objectives for the ITSM Project <p>Point swill be awarded as</p> <ul style="list-style-type: none"> • 100 points – Excellent: The Detailed Work Plan demonstrates all 9 attributes; • 75 points – Very Good: The Detailed Work Plan demonstrates at least 7 out of 9 attributes; • 50 points – Acceptable: The Detailed Work Plan demonstrates at least 5 out of 9 attributes; • 0 points – Unacceptable: The Detailed Work Plan demonstrates four or fewer attributes. 	

R-6 Detailed Work Plan for Contractor Onboarding	
100	Total Maximum Points

2.8. R-7 Detailed Work Plan for for Development of Transition Plan

R-7 Detailed Work Plan for Development of Transition Plan		
<p>The Bidder's response to mandatory criteria #M-8, Detailed Work Plan for Development of Transition Plan, will be further evaluated as detailed below.</p> <p><u>Points available:</u> 100</p>		
Max. Points	Point Allocation	Bidder Response
100	<p>The proposed Detailed Work Plan will be evaluated based on the extent to which the response demonstrates the following attributes:</p> <ol style="list-style-type: none"> 1) Provides all requested information 2) Information provided is concise 3) Information provided is easy to understand 4) Demonstrates an understanding of the complexity of the ITSM Project 5) Includes a sufficient level of detail to the task level 6) Is distinct and specific to the ITSM Project rather than generic template or boilerplate 7) Includes all required deliverables as specified in Annex A - SOW 8) Clearly identifies the interdependencies of SSC and the associated timings 9) Provides unique approaches and/or solution to address SSC's target objectives for the ITSM Project <p>Point swill be awarded as</p> <ul style="list-style-type: none"> • 100 points – Excellent: The Detailed Work Plan demonstrates all 9 attributes; • 75 points – Very Good: The Detailed Work Plan demonstrates at least 7 out of 9 attributes; • 50 points – Acceptable: The Detailed Work Plan demonstrates at least 5 out of 9 attributes; 	

R-7 Detailed Work Plan for Development of Transition Plan		
	<ul style="list-style-type: none"> 0 points – Unacceptable: The Detailed Work Plan demonstrates four or fewer attributes. 	
100	Total Maximum Points	

2.9. R-8 Proposed Core Team Resources

The Bidder should further demonstrate the experience of each of the resources proposed in response to mandatory criteria #M-9, Contractor's Core Delivery Team, in accordance with the point-rated criteria that follows for each applicable resource by job category.

2.9.1. R-8.1 Proposed Contractor Project Manager

R-8.1 Proposed Contractor Project Manager: (Bidder to insert name of Resource proposed in response to #M-9.1)				
Item #	Point-Rated Criteria	Max Points	Point Allocation	Bidder Response
R-8.1.1	The Bidder should demonstrate that its proposed Contractor Project Manager resource holds any of the following professional accreditations: a) Project Management Professional (PMP) b) PRINCE2 Practitioner c) ITIL Foundation Certificate in IT Service Management	15	<ul style="list-style-type: none"> 10 points – PMP or PRINCE2 certification 5 points - ITIL Foundation Certificate in IT Service Management <p><i>Copy of valid (i.e. not expired) accreditation certificate must be provided in Bid.</i></p>	
R-8.1.2	The Bidder should demonstrate, using project descriptions, that the resource has experience, on one project for a minimum duration of twelve months, within the five years preceding the issuance date of this RFP, as a Project Manager managing system implementation within a highly collaborative environment involving another Contractor.	20	<ul style="list-style-type: none"> 10 points – The project (maximum 2) demonstrates the desired experience. 	
R-8.1.3	The Bidder should demonstrate, using project descriptions, that its proposed Contractor Project Manager resource has experience, on one project for a minimum duration of twelve months, within the five years	30	<ul style="list-style-type: none"> 15 points – The project (maximum 2) demonstrates the desired experience. 	

	preceding the issuance date of this RFP, as a Project Manager responsible for implementing the proposed ITSM tool solution.			
R-8.1.4	<p>The Bidder should demonstrate that one of the ITSM projects (if c above) was for a complex environment, measured in terms of :</p> <p>a) The number of employees; the solution supports;</p> <p>b) The number of geographical locations supported; and</p> <p>c) If the client is an IT Service Provider</p>	25	<p>Up to 25 points as follows:</p> <p>a) Number of employees:</p> <ul style="list-style-type: none"> • 10 points - Over 100,000 employees; • 8 points - 50,000 to 99,999 employees; • 5 points - 5,000 to 49,999 employees; or • 1 point - 3,000 to 5,000 employees. <p>b) Number of geographical locations:</p> <ul style="list-style-type: none"> • 10 points - Over 100 geographical locations supported locations; • 8 points - 11 to 99 geographical locations supported locations; or • 5 points - Up to 10 geographical locations supported locations. <p>c) IT Service Provider:</p> <ul style="list-style-type: none"> • 5 points - Yes, the client is an IT Service Provider. 	

		Maximum Score	100	

R-8.2 Proposed Solution/Application Architect

R-8.2 Proposed Solution/Application Architect: (Bidder to insert name of Resource proposed in response to #M-9.2)				
Item #	Point-Rated Criteria	Max Points	Point Allocation	Bidder Response
R-8.2.1	<p>The Bidder should demonstrate that its proposed Solution/Application Architect resource holds any of the following certifications:</p> <p>a) Advanced* certification in the proposed ITSM Tool software (*Note: advanced includes installation, configuration and system administration and architecture).</p> <p>b) ITIL Foundation Certificate in IT Service Management</p>	15	<ul style="list-style-type: none"> • 10 points – Advanced certification in proposed ITSM Tool software • 5 points - ITIL Foundation Certificate in IT Service Management <p><i>Copy of valid (i.e. not expired) accreditation certificate must be provided in Bid.</i></p>	
R-8.2.2	<p>The Bidder should demonstrate, using project descriptions, that its proposed Solution/Application Architect resource has experience, on up to two projects for a minimum duration of twelve months each, within the five years preceding the issuance date of this RFP, as an Application / Software Architect responsible for the end-to end (i.e. from project start-up to solution accepted into production) architecture for a project incorporating the proposed ITSM Tool software:</p>	30	<ul style="list-style-type: none"> • 15 points – The project (maximum 2) demonstrates the desired experience. 	
R-8.2.3	<p>The Bidder should demonstrate, using project descriptions, that its proposed Solution/Application Architect resource has experience, on one project for a minimum duration of twelve months, within the six years preceding the issuance date of this</p>	30	<ul style="list-style-type: none"> • 15 points – The project (maximum 2) demonstrates the desired experience. 	

R-8.2 Proposed Solution/Application Architect: (Bidder to insert name of Resource proposed in response to #M-9.2)				
Item #	Point-Rated Criteria	Max Points	Point Allocation	Bidder Response
	RFP, developing architectures for a solution consisting of multiple tenants supported on a single instance of the proposed ITSM Tool software.			
R-8.2.4	<p>The Bidder should demonstrate, using project descriptions, that its proposed Solution/Application Architect resource has experience, on one project for a minimum duration of twelve months, within the six years preceding the issuance date of this RFP, developing technical architectures for a solution integrating the integrating the proposed ITSM Tool software with the following technologies:</p> <p>a) Other ITSM Tools by means of an application programming interface (API) b) Active Directory c) SAP Financial system d) Discovery Tool for asset Management</p>	25	<p>Up to 25 points as follows:</p> <ul style="list-style-type: none"> • 10 points – For each ITSM Tool (max. 2 tools) by means of an API • 5 points – Active Directory • 5 points – SAP Financial system • 5 points – Discovery Tool for asset Management 	
	Maximum Score	100		

2.9.2. R-8.3 Proposed Integration Specialist

R-8.3 Proposed Integration Specialist: (Bidder to insert name of Resource proposed in response to #M-9.3)				
Item #	Point-Rated Criteria	Max Points	Point Allocation	Bidder Response
R-8.3.1	<p>The Bidder should demonstrate, using project descriptions, that its proposed Integration Specialist resource has experience, on up to two projects for a minimum duration of six months (per project or a total sum of 12 months experience for the two projects), within the five years preceding the issuance date of this RFP, as an Integration Specialist conducting the following activities for a solution incorporating the proposed ITSM Tool software:</p> <p>a) Analyzing and documenting the interfaces between ITSM systems in the current state;</p> <p>b) Developing and documenting strategies and interface solutions to best address the transfer and transformation of data between new and existing systems; and</p> <p>c) Designing, testing, mapping, and implementing data translation objects.</p>	60	<p>Up to 30 points per project (maximum 2) that demonstrates the desired experience as follows:</p> <ul style="list-style-type: none"> • 10 points – Analyzing and documenting the interfaces between ITSM systems in the current state • 10 points – Developing and documenting strategies and interface solutions to best address the transfer and transformation of data between new and existing systems • 10 points – Designing, testing, mapping, and implementing data translation objects 	
R-8.3.2	<p>The Bidder should demonstrate, using project descriptions, that the resource has experience, on at least one project for a minimum duration of six months, within the six years preceding the issuance date of this RFP, , as an Integration Specialist,</p>	40	<p>Up to 40 points as follows:</p> <ul style="list-style-type: none"> • 5 points – per bi-directional integration (max. 8) 	

R-8.3 Proposed Integration Specialist: (Bidder to insert name of Resource proposed in response to #M-9.3)				
Item #	Point-Rated Criteria	Max Points	Point Allocation	Bidder Response
	designing and implementing bi-directional integrations between an ITSM Tool solution and the following systems: a) Other ITSM Tools by means of an application programming interface (API) b) Active Directory c) ERP Tool such as SAP Financial system d) Network Discovery Tool e) Organizational data feeds f) Monitoring/Event management g) Email system h) Business Intelligence system			
	Maximum Score	100		

2.10. R-9 Ease of Configuration of the Proposed ITSM Tool

R-9 Ease of Configuration of the Proposed ITSM Tool				
<p>The Bidder should demonstrate the ease with which the proposed ITSM Tool software can be configured to support the following types of changes to the generic (i.e. out of the box) functionality of the software:</p> <ol style="list-style-type: none"> 1) Add a field to a Change Management Form 2) Change the priority schema of the Incident Management 3) Add categories to Incident Management categorization 4) Define approval processes for Change Requests 5) Define approval processes for Service Requests 6) Change an Item in the Service Catalogue <p>The Bidder should describe the configuration effort, for each of the six changes, in terms of:</p> <ol style="list-style-type: none"> a) Which permission and license type or role is required to complete the change b) The actions / or activities required to complete the change c) If there is a commercially available User Guide to assist in completing the required configuration d) If the change is guaranteed to be automatically preserved during future ITSM Tool software upgrades. <p>Note: Configuration is defined (i.e. limited to) as the following actions:</p> <ul style="list-style-type: none"> • Filling out a form in an administration GUI in the ITSM tool; • Clicking a button or a link; • Changing a documented setting in a configuration file; or • Running a wizard. <p><u>Points available:</u> 600 (100 points per change)</p>				
Item #	Point Rated Criteria	Max Points	Point Allocation	Bidder Response
R-9.1	<u>Change:</u> Add a field to a Change Management Form	100	Up to 100 points will be awarded as follows:	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. <p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in 	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>completing the required configuration.</p> <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration. 	
R-9.2	<u>Change</u> : Change the priority schema of the Incident Management	100	<p>Up to 100 points will be awarded as follows:</p> <p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. 	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in completing the required configuration. <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration. 	
R-9.3	<u>Change</u> : Add categories to Incident Management categorization	100	<p>Up to 100 points will be awarded as follows:</p> <p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide 	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<ul style="list-style-type: none"> • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. <p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in completing the required configuration. <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration. 	
R-9.4	<u>Change</u> : Define approval processes for Change Requests	100	Up to 100 points will be awarded as follows:	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. <p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in 	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>completing the required configuration.</p> <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration. 	
R-9.5	<u>Change</u> : Define approval processes for Service Requests	100	<p>Up to 100 points will be awarded as follows:</p> <p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. 	

R-9 Ease of Configuration of the Proposed ITSM Tool				
			<p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in completing the required configuration. <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration. 	
R-9.6	<u>Change</u> : Change an Item in the Service Catalogue	100	<p>Up to 100 points will be awarded as follows:</p> <p>a) Permissions Required, up to 30 points will be awarded as follows:</p> <ul style="list-style-type: none"> • 30 points - Can be completed by a Client business resource with Functional knowledge of the Tool , without any specialized training, can complete the change with the assistance of available user guide 	

R-9 Ease of Configuration of the Proposed ITSM Tool			
			<ul style="list-style-type: none"> • 15 points Can be completed by a Client technical resource that has completed applicable vendor provided training, <u>or</u> • 0 points - Must be completed by a highly trained product specialist provided by the SW Vendor or System Integrator. <p>b) Action Required</p> <ul style="list-style-type: none"> • 25 points - The required configuration can be completed through Configuration (as defined above). <p>c) User Guide</p> <ul style="list-style-type: none"> • 25 points - There is a commercially available User Guide to assist the client in completing the required configuration. <p>d) Change Preserved</p> <ul style="list-style-type: none"> • 20 points - There is a commercially available User Guide to assist the client in completing the required configuration.
Total Maximum Points		600	

Table #1 - ITSM Tool Software, Mandatory Response Form

The Bidder must complete Table #1 as follows:

- a) Under column D titled “Included in Bid (Y/N)”, for each associated Functional Requirement (FR) listed under column C, the Bidder must confirm (“Yes” or “No”) that the Functional Requirement is met by the proposed ITSM Tool Software.
- b) Under column E titled “Part #”, for each associated Functional Requirement listed under column C, the Bidder must insert the part number associated with the currently available version of the ITSM Tool Software proposed in response to criteria #M-13 which provides the mandatory Functional Requirement.
- c) Under column F titled “Reference to Product Documentation”, for each associated Functional Requirement listed under column C, the Bidder must substantiate its’ claim that the proposed ITSM Tool software meets the Functional Requirement by providing a cross-reference to substantiating product documentation. The cross reference should cite the section number, section title, and page number where the required information appears.

Table #1 – ITSM Tool Software Functional Requirements (FR) Mandatory Response Form					
A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-1.1	Bilingual	The ITSM Tool must include functionality that allows users to choose to work in English or French (e.g. fields, button, forms, selection lists, labels and notifications, help screens and mouse overs must be in the chosen language) and allow the user to toggle from French to English. The ITSM Tool software must also remember the user’s chosen language preference.			
FR-1.2	Search Capabilities	The ITSM Tool must include functionality that provides search capabilities in all ITSM processes including ad-hoc queries, save queries, user queries, role-based queries, shared/public queries. <ul style="list-style-type: none"> - Ad hoc queries (support/process staff) - Portal <ul style="list-style-type: none"> o Search across service catalog o Search across knowledge base articles/FAQs/bulletin board/broadcasts 			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		<ul style="list-style-type: none"> - Queues/consoles <ul style="list-style-type: none"> o Saved searches o Role based searches and views 			
FR-1.3	Integration with Customer ITSM Tools	The ITSM Tool must have the capability to support standardized processes and an ITSM Tool interface that enables bi-directional communication between SSC's Tool and customers' tool with smooth and continuous workflow to support and improve the quality delivery of services.			
FR-1.4	Shared Ticket Visibility	The ITSM Tool must include functionality that provides customer/SSC visibility of shared ticket (e.g. incident, problem, change) and CI information to understand departmental-wide impacts/dependencies of outages, planned change activity, etc.			
FR-1.5	Email	Users of the ITSM Tool must be able to create and update tickets (e.g. incidents, service requests, changes) via email.			
FR-1.6	Voice Recognition	The ITSM Tool must have the capability to create a request or incident and update status through integration with Integrated Voice Recognition (IVR).			
FR-1.7	ITSM User Categories	The ITSM Tool must include functionality that allows for the identification of user categories that will permit the separation of access and permissions.			
FR-1.8	System Notifications	The ITSM Tool must include functionality that allows for the configuration of, at process level, when users should receive notifications from the system.			
FR-1.10	Mobile-based Approvals	The ITSM Tool must include functionality that allows SSC and non-SSC GC employees the ability to approve or reject any type of ITSM-related approval request from a mobile device, including BlackBerry devices.			

Table #1 – ITSM Tool Software Functional Requirements (FR) Mandatory Response Form					
A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-1.11	Change & Release Calendar	The ITSM Tool must include an integrated change and release calendar that automatically displays the change and release activities recorded in the Tool.			
FR-1.12	Multi-Tenancy	<p>The ITSM Tool must support multi-tenancy, and the following use cases at a minimum, and through configuration:</p> <ul style="list-style-type: none"> - The default state for multi-tenancy must be that tenants are unable to view or access the data of other tenants. - Each Tenant must be able to configure the ITSM processes independently of one another. This includes, but is not limited to: <ul style="list-style-type: none"> o ITSM record categories o SLA targets o Resolver Groups, Employees, Locations o Workflows, including Service Request models, Approvals and ticket routing - The ITSM Tool must allow SSC to configure specific SSC infrastructure assets (CIs) that can be viewed by a defined set of users in Customer Departments. - The ITSM Tool must allow SSC to configure specific Customer infrastructure assets (CIs) that can be viewed by a defined set of users at SSC. - The ITSM Tool must allow incidents assigned to a resolver group in one tenant to be assigned to a resolver group in another specific tenant. - The ITSM Tool must allow GC Customer tenants to have visibility of upcoming Change Management activity planned by SSC and vice-versa. 			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-1.13	Import/Export Functionality	The ITSM Tool must include a GUI-based method for importing and exporting data to and from the ITSM Tool, respectively. At a minimum, the ITSM Tool must support .XML and comma-delimited file formats for export and import.			
FR-1.14	Queue Management	The ITSM Tool must include customizable screens, including functionality to allow users in different roles to manage and filter their work queues (Incidents, Change Requests, Service Requests, Etc.)			
FR-1.15	Automatic Ticket Routing	The ITSM Tool must include functionality that allows process administrators to define rules and/or workflows to intelligently route ITSM tickets (e.g. Incidents, Change Requests, Service Requests) to the correct resolver group based on data attributes of the ticket.			
FR-1.16	Impact	The ITSM Tool must include functionality that allows users to visualize impacted end-users/services from the Incident or Change Request screens.			
FR-1.17	Process Flexibility	The ITSM Tool must be flexible in how ITSM processes are designed and configured. For example, it must be possible to add or remove one or more approval gates to a process, through configuration.			
FR-1.18	User Notifications	The ITSM Tool must include functionality to send user notifications from the system in the user's chosen language.			
FR-2.1	Portal for End Users	The ITSM Tool must include a self-service portal where end user may view the catalogue of services that they are entitled to, access knowledge base articles and FAQs, submit, update and monitor the status of their incidents and requests and view the status of relevant problems.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-2.2	Support for Business Line Services	The ITSM Tool must include functionality that allows customers/end-users to order goods and services from various non-IT lines of business (e.g. HR, Facilities).			
FR-2.3	Search Capability	The ITSM Tool must include functionality that allows the end user to search knowledge base for solution via keyword, Boolean operators and full-text search.			
FR-2.4	Align Content with End User Needs	The ITSM Tool must include functionality that allows for the association of end users with specific groups, lines of business, etc., and to tailor presented content, information and self-service options based on specific role or group entitlements.			
FR-2.5	Survey Capability	The ITSM Tool must include functionality to create, deliver and manage end user satisfaction surveys (e.g. incident closure).			
FR-2.6	Capture End User Feedback	The ITSM Tool must include functionality that allows administrators to provide a "suggestion box" for soliciting feedback from customers on process and interface.			
FR-2.7	Chat Support	The ITSM Tool must have the capability to provide "chat" support for self-service usage.			
FR-2.8	Bulletin Board Functionality	The ITSM Tool must include functionality to publish service related information including outages, scheduled downtimes and other issues.			
FR-2.9	External Partner/Public Use	The ITSM Tool must include the ability to extend the use of the portal to external partners (e.g. provincial partners, airport authority, etc.) and Canadian public.			
FR-3.1	Different Service Types	The ITSM Tool must include functionality to have different types of services in the service catalogue, such as customer-facing services, technical service, supporting services.			
FR-3.2	SCM User Access	The ITSM Tool must utilize role-based security to control access to the service catalogue.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-3.3	Organizing Services	The ITSM Tool must include functionality that allows services to be organized into logical groupings or hierarchical structures. This must be reflected in the self-service portal.			
FR-3.4	Service Definition	The ITSM Tool must include functionality that provides configurable service definition templates out of the box.			
FR-3.5	Service Entitlements	The ITSM Tool must include functionality that allows service catalogue managers to assign entitlements to service offering so that end users are only allowed to request offerings that they are entitled to. Entitlements must be flexible in terms of how they are assigned (e.g. location, Org unit, etc.)			
FR-3.6	Structured Content	The ITSM Tool must include functionality to publish services using a structured content framework for services, service offerings, etc. including descriptions, associated features, benefits, service levels, and pricing/costing.			
FR-3.7	Service Level Assignment	The ITSM Tool must include functionality that allows SSC to support different service levels for the same service (e.g., bronze, silver, gold levels).			
FR-3.8	Search Capability	The ITSM Tool must include functionality that allows users to quickly find services via a search engine.			
FR-3.9	Request Service	The ITSM Tool must include functionality that allows users to create and track service requests through the service catalogue via the self-service portal.			
FR-3.10	Multifunction Support	The ITSM Tool must include functionality that allows the service catalogue to support multiple business line (example: IT, HR, facilities, procurement).			
FR-3.11	CMDB Integration	The ITSM Tool must include functionality for the service catalogue to integrate with the configuration management database and allow for the categorization			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		of services and service CI information to be shared across the service catalogue and CMDB modules.			
FR-3.12	Service Status	The ITSM Tool must include functionality to handle different service states (for example, services in design versus services in production).			
FR-3.13	Business Line Support	The ITSM Tool must have the include functionality that allows business lines to create service definitions, design service workflow and easily publish these services into the catalogue.			
FR-4.1	Construct Queries and Reports	The ITSM Tool must include functionality that allows users to easily construct queries and reports using attributes that span ITSM entities. (E.g. Change Requests and related tasks, CIs)			
FR-4.2	Ad-hoc Reports	The ITSM Tool must include functionality that allows for the creation of custom ad-hoc parameters on reports (e.g., report is called and prompts user to enter query parameter values instead of hard-coding those values in the query). Individual users of all types require this ability.			
FR-4.3	Standard Reports	The ITSM Tool must have predefined standard reports for users and administrators.			
FR-4.4	Export Capability	The ITSM Tool must include functionality to easily export reports and report data for consumption outside the system. (i.e. PDF, xls).			
FR-4.5	Report Drill Down Capability	The ITSM Tool must include functionality to "drill down" on reports and dashboards from within the ITSM software's UI			
FR-4.6	External Data Integration	The ITSM Tool must have the capability to integrate with external data sources.			
FR-4.7	Business Analytics	The ITSM Tool must have the capability to support business analytics (business intelligence tools).			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-4.8	Restrict Access	The ITSM Tool must include functionality to restrict access to reports by role.			
FR-4.11	Historical Reporting	The ITSM Tool must include functionality that allows selection field values to be removed, but preserved in the database for historical reporting purposes. This applies to drop-downs, menus, radio buttons, check boxes etc.			
FR-4.12	Dashboard Capability	The ITSM Tool must include functionality for real-time reporting via graphical and configurable dashboards.			
FR-4.13	Dashboard Display	The ITSM Tool must include functionality that provides real-time dashboard display for each process that is customizable based on individual, role or informational needs.			
FR-4.14	Trending Reports	The ITSM Tool must include functionality that provides historical trending reports and volumetrics specific to each ITSM process. (Incident Management, Request Fulfillment, Problem Management, Change Management, Service Catalogue Management, etc.).			
FR-5.1	Incidents and Service Requests	The ITSM Tool must store incidents and requests separately, as different record types.			
FR-5.2	Incident Records	The ITSM Tool must include functionality that allows users to create, classify, update and close or cancel incident records.			
FR-5.3	Incident Record Creation	The ITSM Tool must enforce required fields to be populated, and that all fields are populated with the intended data type and format as incident records are created and modified.			
FR-5.4	Ticket Initiation	The ITSM Tool must include functionality that allows users to initiate a ticket on behalf of someone else, and store both the requestor and author of the incident.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-5.5	Link Incidents to Other Records	The ITSM Tool must include functionality that allows users to link incidents to problems, knowledgebase, known workarounds and change records.			
FR-5.6	Link Incidents to Services/CIs	The ITSM Tool must include functionality that allows users to link incident records to the impacted service(s), CIs and group of CIs.			
FR-5.7	Link to Multi-Service Tiers	The ITSM Tool must include functionality that allows users to manage and link incident records to multiple tiers of service/service levels depending on customer and associated service.			
FR-5.8	View Impacted CIs	The ITSM Tool must include functionality that allows users to view impacted CIs from within an incident record, and to view upstream and downstream affected CIs and services through a visual depiction.			
FR-5.9	Incident Categorization	The ITSM Tool must include functionality that allows users to categorize incidents based on a standard categorization scheme.			
FR-5.10	Incident Prioritization	The ITSM Tool must include functionality that allows users to prioritize incidents based on a standard prioritization scheme that is derived through assessment of business impact and business urgency.			
FR-5.11	Incident Matching	The ITSM Tool must include functionality that allows users to match incidents to determine if an incident is a duplicate or if it might be related to an existing problem or known error.			
FR-5.12	Incident Automation	The ITSM Tool must include functionality to automate incident models (e.g. chronological order and dependencies of steps to be actioned by specific roles, timescales and thresholds for completion and required escalation) based on incident classification.			
FR-5.13	Incident Routing	The ITSM Tool must include functionality to route incidents based on available resources located across			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		multiple sites and other factors, such as time of day, tiered service values, incident classification, etc.			
FR-5.14	Alert Capability	The ITSM Tool must include functionality to send incident management notifications using a variety of methods including e-mail, mobile device notification, pager or SMS text messaging.			
FR-5.15	Escalation Capability	The ITSM Tool must include functionality for hierarchical escalation, both manually and automated based on business rules, upon incident status change, priority change and/or service level clock expiration.			
FR-5.16	Information Capture	The ITSM Tool must include functionality that allows users to input free text, screen captures, and file attachments while recording incident descriptions and resolution activities.			
FR-5.17	Time Stamping	The ITSM Tool must include functionality that allows users to track the time that an incident was in a specific status during its lifecycle (e.g. initial diagnosis, investigation, resolved), and how long an incident was assigned to each resolver group in the case of reassignment. This information must be available in the software's UI and via reports.			
FR-5.18	Knowledge Access	The ITSM Tool must include functionality that allows users to access knowledge and/or support scripts for incident diagnosis and resolution.			
FR-5.19	Multiple Sequential Assignments	The ITSM Tool must include functionality to manage and maintain multiple sequential assignments for each open Incident.			
FR-5.20	Collaboration	The ITSM Tool must include functionality that allows members of multiple resolver groups to collaborate on a single incident			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-5.21	Hierarchical Escalation Notification	The ITSM Tool must include functionality for hierarchical notification about incidents that exceed or will soon exceed priority/service level parameters.			
FR-5.22	Hold Status	The ITSM Tool must include functionality that allows users to put incidents on hold in certain (configurable) situations so time does not count against service level targets.			
FR-5.23	View Time Left	The ITSM Tool must include functionality that allows users to see countdown time left on response or resolve time (associated with priority or service level targets)			
FR-5.24	User Notification	The ITSM Tool must include functionality to trigger a notification to the user when a ticket is placed in a resolved status.			
FR-5.25	Automated Ticket Closure	The ITSM Tool must include functionality to automatically close tickets at a predetermined number of business days after a ticket enters resolved status.			
FR-5.26	Closure Codes	The ITSM Tool must include functionality to use configurable closure categorization codes upon incident closure.			
FR-5.27	Survey Capability	The ITSM Tool include functionality to collect end-user satisfaction feedback upon the close of an incident.			
FR-5.28	Incident Reactivation	The ITSM Tool must include functionality that allows users to reactivate incident in resolved status.			
FR-5.29	Event/Incident Integration	The ITSM Tool must have the capability to automatically create, update and close incidents upon receiving information from an integrated event monitoring tool.			
FR-5.30	Self-Service Portal Integration	The ITSM Tool must include functionality that allows users to submit incidents and view their status via a self-service portal.			
FR-5.31	Email Support	The ITSM Tool must include functionality that allows users to submit incidents via email and also receive timely updates, through email system integration.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-5.32	Change/Problem Creation	The ITSM Tool must include functionality that allows users to create a change or problem from an incident with automatic population of fields.			
FR-5.33	Problem Management Integration	The ITSM Tool must include integration with Problem Management allowing for viewing of problem and known error details for the use in matching, troubleshooting and resolution and linking incident records to related problem records.			
FR-5.34	Change Management Integration	The ITSM Tool must include integration with Change Management allowing for the creation of a change record to resolve an incident and to link associated incident record(s) to the change record.			
FR-5.35	Service Asset and Configuration Management	The ITSM Tool must include integration with Service Asset and Configuration Management allowing for the linking of incident records to CI records in order to make CI information available to assist in the classification and prioritization of incidents and allow visibility into incidents associated with a CI or set of CIs.			
FR-5.36	Knowledge Management Integration	The ITSM Tool must include integration with Knowledge Management allowing for access to knowledge articles, support scripts, and known workarounds for incident diagnosis, creating knowledge entries and publishing end-user based FAQs.			
FR-5.37	Service Level Management Integration	The ITSM Tool must include functionality to link to service levels for alerting and so that impact can be assessed if a service is performing below agreed upon levels.			
FR-5.38	Recurring Incident Templates	The ITSM Tool must include functionality that allows users to develop templates for recurring incidents.			
FR-6.1	Service Request Records	The ITSM Tool must include functionality that allows users to create, classify, approve, update, and close or cancel service request records.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-6.2	Service Request Record Creation	The ITSM Tool must enforce required fields to be populated, and that all fields are populated with the intended data type and format as incident records are created and modified.			
FR-6.3	Attachments	The ITSM Tool must include functionality that allows users to submit attachments as part of a service request and have them stored in the record.			
FR-6.4	Request Models	The ITSM Tool must include functionality that allows users to configure dynamic request models and workflows for different types of requests that support multi-level approvals, answer-based decisions and paths, and a variety of fulfillment options (E.g. change request, orchestration)			
FR-6.5	Workflow Capability	The ITSM Tool must include functionality that allows users to configure a service request workflow from initial request to fulfillment including: <ul style="list-style-type: none"> i. the ability to support serial and parallel workflow paths; and the ability to identify and associate approval and information points required during the flow until final delivery is successfully accomplished.			
FR-6.6	Authorized Requestors	The ITSM Tool must include functionality that limits viewing, creating and editing requests only to authorized requestors.			
FR-6.7	Service Request Categorization	The ITSM Tool must include functionality that allows users to categorize service requests based on a standard categorization scheme.			
FR-6.8	Service Request Prioritization	The ITSM Tool must include functionality that allows users to prioritize service requests based on a standard prioritization scheme that is derived from the assessment of business impact and business urgency.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-6.9	Request Automation	The ITSM Tool must include functionality to automatically send, receive and log approvals for requests.			
FR-6.10	Automation Override	The ITSM Tool must include functionality that allows users to manually override automation, when required.			
FR-6.11	Automatic Routing	The ITSM Tool must include functionality to automatically route requests for appropriate authorization and fulfillment.			
FR-6.12	Task Assignment	The ITSM Tool must include functionality to assign tasks to groups or individuals to be accomplished within a specified time frame. The ITSM Tool software must notify the assignee of the task and due date.			
FR-6.13	Time Tracking	The ITSM Tool must include functionality that allows users to track the time that a service request was in a specific status during its lifecycle (e.g. received, assigned, being fulfilled, complete, closed), and how long a request was assigned to each resolver group in the case of reassignment. This information must be available in the software's UI and via reports.			
FR-6.14	Service Level Targets	The ITSM Tool must include functionality that allows users to see countdown time left on fulfillment time (associated with service level targets) and trigger automated escalation if target is breached.			
FR-6.15	Automated Status Updates	The ITSM Tool must include functionality to provide automated status updates to requestors when a request reaches specific points in the workflow.			
FR-6.16	Request Cancellation	The ITSM Tool must include functionality that allows users to cancel a service request through the self-service portal.			
FR-6.17	Service Catalogue and	The ITSM Tool must include integration with the service catalogue and self-service portal, allowing users view			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
	Self-Service Portal Integration	and request services through the portal based on their entitlement.			
FR-6.18	Service Asset and Configuration Management Integration	The ITSM Tool must include integration with Service Asset and Configuration Management allowing for the linking of service request records to CI records.			
FR-6.19	Change Management Integration	The ITSM Tool must include integration with Change Management allowing for the creation of a change record where required to fulfill a request.			
FR-6.20	Integration with Other Fulfillment Technologies	The ITSM Tool must have the capability to integrate with other fulfillment technologies (e.g. VM provisioning, orchestration), which will update the request to indicate when fulfillment is completed.			
FR-7.1	Change Records	The ITSM Tool must include functionality that allows users to create, classify, approve, update and close or cancel change records.			
FR-7.2	Change Record Creation	The ITSM Tool must include functionality that allows authorized users to create new change records, enforce data rules and types, and required fields.			
FR-7.3	Link Changes to Services/CIs	The ITSM Tool must include functionality that allows users to link change records to impacted service(s), CIs, and group of CIs.			
FR7.4	View Impacted CIs	The ITSM Tool must include functionality that allows users to view impacted CIs from within a change record, and to view upstream and downstream affected CIs and services through a visual depiction.			
FR-7.5	Change Categorization	The ITSM Tool must include functionality that allows users to categorize changes based on a standard categorization scheme.			
FR-7.6	Change Prioritization	The ITSM Tool must include functionality that allows users to prioritize changes based on a standard			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		prioritization scheme that is derived from the assessment of business impact and business urgency.			
FR-7.7	Configure Risk Assessment	The ITSM Tool must include functionality that allows users to configure the parameters upon which risk is calculated by the Tool considering business impact, affected application/business services criticality, collision, historical change information, and compliance with maintenance windows and black-out periods.			
FR-7.8	Risk and Impact Analysis	The ITSM Tool must include functionality to automatically determine risk and impact analysis of multiple changes, and provide visual depictions of upstream and downstream CIs that can be navigated based on information in a configuration management database (CMDB).			
FR-7.9	Information Capture	The ITSM Tool must include functionality that allows users to enter free form text, screen captures, and file attachments for recording of change request descriptions.			
FR-7.10	Templated Change Workflow	The ITSM Tool must provide templated workflow for pre-approved, normal and emergency change types, including pre-defined classification field values as well as tasks involved in the specific type of change.			
FR-7.11	Tasks	The ITSM Tool must include functionality to: <ul style="list-style-type: none"> i. Sequence and re-sequence tasks; ii. Group tasks; and iii. Allow tasks to be completed in serial or parallel. 			
FR-7.12	Task Assignment	The ITSM Tool must include functionality that allows users to assign tasks to groups or individuals to be accomplished within a specified time frame. The Tool shall notify the assignee of the task and due date.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-7.13	Documentation	The ITSM Tool must include functionality that allows users to store back-out procedures, installation and turnover documents within the change record.			
FR-7.14	CAB Support	The ITSM Tool must include functionality to support a CAB (i.e., approvals/issues submitted and stored electronically).			
FR-7.15	Role-based Approval	The ITSM Tool must include functionality to have multiple role-based approvers and electronic routing of those approvals.			
FR-7.16	Automated Approval Workflow	The ITSM Tool must provide Automated Approval workflow functionality including: <ul style="list-style-type: none"> i. Ability to automatically send approval requests to designated approvers based at a minimum on categorization, impact, risk level, location, impacted CIs, areas, or customers, etc.). ii. Ability to pick up and record approver responses. iii. Ability to change status if approval criteria met. iv. Send notification of approval (rejection) to change owner and change manager. 			
FR-7.17	Approval Request Capability	The ITSM Tool must include functionality to: <ul style="list-style-type: none"> i. send approval requests several times (manually or automatically based on record conditions); ii. store multiple instances of approvals; iii. reset approval status; iv. resend approval requests (manually or automatically based on record conditions); and v. record the history and results of request approvals. 			
FR-7.18	Repeatable Changes	The ITSM Tool must include functionality that allows users to select and create change requests from a viewable library and select an associated predefined			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		template with prepopulated content, such as categorization, text, tasks and CIs.			
FR-7.19	Proactive Notification	The ITSM Tool must include functionality to provide proactive notification to stakeholders and change advisory board (CAB) members for changes with significant business impact, collisions and compliancy issues.			
FR-7.20	Change Calendar	The ITSM Tool must include a change calendar with scheduled change viewing by group, and to customize the sorting and filtering of calendar views.			
FR-7.21	Change Scheduling	The ITSM Tool must include functionality that allows users to schedule recurring events, such as certain types of maintenance.			
FR-7.22	Microsoft Exchange Integration	The ITSM Tool must have the capability to integrate forward schedule of changes (FSC) with Microsoft Exchange calendaring system.			
FR-7.23	Change Calendar (Cross Platform)	The ITSM Tool must automatically make the change calendar available across multiple platforms: (Mobile Device, web browser). The software must be able to publish or expose the change calendar to an external web page that is not part of the ITSM software.			
FR-7.24	Support Freeze Windows	The ITSM Tool include functionality that allows users to define and enforce maintenance, release and moratoriums for freeze windows.			
FR-7.25	Promote to a Release	The ITSM Tool must include functionality that allows users to promote one or more changes to a release within the application, and generate corresponding notifications to change and release stakeholders.			
FR-7.26	Change Notification	The ITSM Tool must include functionality to send an automated notification of changes to appropriate person(s) when change is updated, status change, etc.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-7.27	Change Dashboard	The ITSM Tool must include a change dashboard that can be customized by individual users based on person, group, service and customer.			
FR-7.28	Automated Notifications (Start Time)	The ITSM Tool must include functionality to send automated notifications at the scheduled start time to all identified activity assignees to remind them of the change.			
FR-7.29	Automated Notifications (Implementation)	The ITSM Tool must include functionality to send automated notifications upon individual change task completion, and overall change implementation completion.			
FR-7.30	Link to Projects	The ITSM Tool must include functionality that allows users to link change records to projects.			
FR-7.31	Status Tracking	The ITSM Tool must include functionality that allows users to review the status of change requests including who updated the status at what date/time. This includes past history.			
FR-7.32	Automatic Warnings	The ITSM Tool must include functionality to automatically warn the user of any changes that exceed pre-specified time periods during any stage.			
FR-7.33	Automatic Warnings	The ITSM Tool must include functionality to warn users if the change request they are planning impacts or changes infrastructure or services being impacted or changed by other change requests in the same timeframe.			
FR-7.34	Incident Management Integration	The ITSM Tool must include integration with Incident Management allowing for the linking of incident records to change records in order to provide full visibility of incidents caused by changes.			
FR-7.35	Request Fulfillment Integration	The ITSM Tool must include integration with Request Fulfillment allowing for the creation of a change record where required to fulfill a request.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-7.36	Problem Management Integration	The ITSM Tool must include integration with Problem Management allowing for the linking of problem records to change records in order to provide full visibility into problems caused by changes.			
FR-7.37	Service Asset and Configuration Management Integration	The ITSM Tool must include integration with Service Asset and Configuration Management allowing for the linking of change records to CI records and to make up-to-date CI information readily available to assist in prioritizing and assessing the impact of changes.			
FR-7.38	Release and Deployment Management Integration	The ITSM Tool must include integration with Release and Deployment Management allowing for the linking of change records to release records and to view the status of releases.			
FR-7.39	Service Catalogue and Service Portal Interface	The ITSM Tool must include integration with the service catalogue and self-service portal, allowing specific user types to view and request services through the portal based on their entitlement.			
FR-7.40	Service Level Management Integration	The ITSM Tool must include functionality to link to service levels for alerting and so that impact can be assessed if a change is performing below agreed upon levels.			
FR-7.41	Time Tracking	The ITSM Tool must include functionality that allows users to track the time that a change request was in a specific status during its lifecycle (e.g. draft, planning, approval states, in progress), and how long a change request was assigned to each resolver group in the case of reassignment. This information must be available in the software's UI and via reports.			
FR-8.1	Access Control	The ITSM Tool must provide different levels of access to configuration information based on roles defined and assigned within the Tool.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-8.2	Add or Remove CI Types	The ITSM Tool must provide a data model and functionality that allows for the addition or removal of configuration item (CI) types and their corresponding fields. (Note: no programming skills or System Administrator permissions shall be required to add a CI type or its corresponding fields).			
FR-8.3	Display CI Fields	The ITSM Tool must include functionality that allows users to display CI fields based on a CI type.			
FR-8.4	Create New CIs	The ITSM Tool must include functionality that allows designated users to create new CIs (including fill in all field values).			
FR-8.5	Data Validation Rules	The ITSM Tool must include functionality to enforce data validation rules on field values on creation of any new CI.			
FR-8.6	Edit CI Field Values	The ITSM Tool must include functionality to edit any existing CI field values by varying degrees by authorized users.			
FR-8.7	CI Dependencies	The ITSM Tool must include functionality to define the dependency relationship between CIs in both directions using custom terminology (i.e. hosted on, hosts).			
FR-8.8	Graphical View of Dependencies	The ITSM Tool must include functionality to provide a graphical representation of the dependencies between CIs			
FR-8.9	Automated Alerts	The ITSM Tool must include functionality to determine when a CI is in an authorized state (e.g. as a result of discovery and automated reconciliation) and automatically initiate a workflow action, or a role-based notification (E.g. CI owner).			
FR-8.10	Assign Maintenance Windows	The ITSM Tool must include functionality that allows users to assign maintenance windows to any CIs.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-8.11	Freeze CIs	The ITSM Tool must include functionality to "freeze" a CI so that it cannot have a change logged against it.			
FR-8.12	Auto Discovery	The ITSM Tool must have the capability to integrate with SSC's existing discovery tool (Tivoli Application Dependency Discovery Manager) and other industry best-of-breed discovery tools. The integration must support CI creation and updates, as well as the creation and maintenance of dependency relationships between CIs if these have been modelled in the discovery tool.			
FR-8.13	Reconciliation	<p>The ITSM Tool must include functionality to reconcile discovered CIs against those CIs already in the CMDB so that only the correct attributes on the correct CI(s) are updated. The Tool must possess configuration-based means to ensure that discovered CIs are populated in the CMDB with valid data (classification, product catalog references, etc.).</p> <p>This process must occur on a scheduled or continuous basis and be configurable by business users with the appropriate level of access.</p>			
FR-8.14	Multiple Data Sources	The ITSM Tool Solution must be able to receive CI and relationship data from a variety of sources and configure the reconciliation rules differently for each.			
FR-8.15	Set Workflow Triggers	The ITSM Tool must include functionality to set automatic workflow triggers based on CI attribute values (e.g. change of CI status).			
FR-8.16	Audit Trail of Changes (Attributes)	The ITSM Tool must include functionality to maintain an audit trail of changes made to a CI attribute over time.			
FR-8.17	Audit Trail of Changes (CI)	The ITSM Tool must include functionality to maintain an audit trail of change requests made to a CI over time.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-8.18	Search Capability	The ITSM Tool must include functionality that allows users to search for a CI by any CI field, or combination of fields.			
FR-8.19	Ad Hoc Queries	The ITSM Tool must include functionality that allows users to perform ad hoc/general queries.			
FR-8.20	Data Import / Export	The ITSM Tool must include functionality that supports both flexible data import/export including: <ul style="list-style-type: none"> - Flexible file types (XML, csv) - Scheduled/Automated import jobs 			
FR-8.21	Incident Management Integration	The ITSM Tool must include integration with Incident Management allowing for the linking of incident records to CI records and to make CI information readily available to assist in the classification and prioritization of incidents.			
FR-8.22	Problem Management Integration	The ITSM Tool must include integration with Problem Management allowing for the linking of problem records to CI records and to make CI information readily available to assist in the classification and prioritization of problems.			
FR-8.23	Change Management Integration	The ITSM Tool must include integration with Change Management allowing for the linking of change records to CI records and to make CI information readily available to assist in prioritizing and assessing the impact of changes.			
FR-8.24	Release Management Integration	The ITSM Tool must include integration with Release Management allowing for the display and reporting of impacted CIs via their link to changes associated with a release.			
FR-8.25	Service Level Management Integration	The ITSM Tool must include integration with Service Level Management allowing for the linking of services to CI records and to make CI information readily available to assist in determining service dependencies.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-8.26	Request Fulfillment Integration	The ITSM Tool must include integration with Request Fulfillment allowing for the linking of service requests to CI records.			
FR-8.27	Service Catalogue Integration	The ITSM Tool must include integration with Service Catalogue allowing for the linking of services to CI records and to make CI information readily available to assist in determining service dependencies.			
FR-8.28	Knowledge Management Integration	The ITSM Tool must include integration with Knowledge Management allowing for the linking of knowledge to CI records.			
FR-8.29	Asset Tracking	The ITSM Tool must include functionality that allows users to track asset status and lifecycle management such as procurement, stored, configured, deployed, active, retired and disposed stages to support release impact analysis, planning, rollout and deployment activities.			
FR-8.30	Release Support	The ITSM Tool must include functionality to support release impact analysis, planning, rollout and deployment activities.			
FR-8.31	Contracts and Licensing Agreements	The ITSM Tool must include functionality that allows users to record a wide variety of contracts and licensing agreements by attaching them to records.			
FR-8.32	Contract and Agreement Tracking	The ITSM Tool must include functionality that allows users to track the physical location of contracts and agreements, and identify the individuals responsible for them.			
FR-8.33	Software Audit	The ITSM Tool must have the capability for Multiple Software Audit options – import software audit information from FrontRange Discovery, Microsoft SMS & SCCM and other solutions.			
FR-8.34	Software Licensing Models	The ITSM Tool must include functionality to support Multiple Licensing Models for tracking software – from			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		off-the-shelf application through to company-wide and version maintenance agreements.			
FR-8.35	Software License Management	The ITSM Tool must include functionality to perform software license management including automated notification of license expiration and non-compliance and reporting, tracking and auditing			
FR-8.36	Costing Support	The ITSM Tool must include functionality that allows for the grouping of an individual customer's/user's assets/CIs and services to provide cost information.			
FR-8.37	Lease, Warranty and Contract Management	The ITSM Tool must include functionality that allows users to manage leases, depreciation schedules, warranties, and service provider contracts.			
FR-8.38	Track Asset/ CI Costs	The ITSM Tool must include functionality that allows users to track both fixed and variable costs of assets/CIs.			
FR-8.39	Barcode Scanners	The ITSM Tool must have the capability to interface with barcode scanning hardware and software for the purposes creating or updating CIs based on Asset Tag or Serial Number information.			
FR-9.1	Agreements and Contracts	The ITSM Tool must include functionality that allows users to store agreements and contracts.			
FR-9.2	Store SLM information in CMDB	The ITSM Tool must include functionality that allows users to store Service Level Management information (service levels, agreements, contracts, reports) in CMDB as structured data.			
FR-9.3	Multiple SLA Structure Support	The ITSM Tool must include functionality to support multiple SLA structures and store information related to master agreements, extensions and/or addendums for specific business units.			
FR-9.4	Service Level Performance	The ITSM Tool must include functionality to link service levels to business units or departments, so that impact			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
		can be assessed if a service is performing below agreed upon levels.			
FR-9.5	Historical Service Information	The ITSM Tool must include functionality to retain and maintain historical data and information on services. This includes service level result data for each service.			
FR-9.6	Multiple Service Level Targets	The ITSM Tool must have the capability to allow process administrators to configure multiple service level targets for each process. (E.g. An incident may have targets for response and resolution). Each target must be able to have multiple time thresholds that can trigger different escalation actions (E.g. notify different stakeholders at 30, 15 and 5 minutes before target is breached)			
FR-9.7	Service Dashboards	The ITSM Tool must include functionality that allows users to create dashboards or scorecards that communicate service performance to Service Owners/Leads and other interested parties.			
FR-9.8	Management of Service Level Targets	The ITSM Tool must include functionality to automate the management of service level targets in terms of automated business rules, alerts, escalations and notifications.			
FR-9.9	Support Levels	The ITSM Tool must include functionality that allows users to publish different service levels for the same service.			
FR-9.10	Search Engine	The ITSM Tool must include functionality of a search engine to facilitate locating service information.			
FR-9.11	Multiple Contracts	The ITSM Tool must include functionality that allows users to define multiple contract types and contracts per customer.			
FR-9.12	Priority Definitions and Action Times	The ITSM Tool must include functionality to handle different priority definitions and action times for each customer.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-9.13	Agreement and Contract Review	The ITSM Tool must include functionality that allows users to schedule agreement and contract review cycles and renewals.			
FR-9.14	Service Level Achievement Against Target	The ITSM Tool must include functionality that allows users to report on service level achievements vs. service level targets in real-time and at regular planned intervals.			
FR-10.1	Event Monitoring and Incident Management Integration	The ITSM Tool must have the capability to integrate event and alert monitoring tools with Incident Management to allow for automatic creation and update of incidents from these tools, based on business rules.			
FR-10.2	Service Impact Assessment	The ITSM Tool must include functionality that allows users to identify which customer-facing service(s) is impacted by an event based on service/CI dependency mapping (CMDB), when an incident is created either manually or through the integration with an event and/or alert monitoring tool.			
FR-11.1	Search Capability	The ITSM Tool must include functionality that allows users to launch fast knowledge searches from other ITSM record types (e.g. Incident) using the categorization (or partial categorization) selections as key value search parameters.			
FR-11.2	Search Capability	The ITSM Tool must include functionality that provides knowledge management capabilities by displaying the most relevant hits at the top, in order of closest match to search.			
FR-11.3	Weighting and Scoring Articles	The ITSM Tool must include functionality that allows a knowledge manager to administer the weighting and relevancy scores associated with knowledge articles (e.g. based on key word searching and usage).			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-11.4	Article Creation	The ITSM Tool must include functionality that allows users to create a knowledge article via a fill-in-the-blank template.			
FR-11.5	Role-based Knowledge	The ITSM Tool must support role-based knowledge items, in terms of which roles can access various types of articles. (i.e., a technical role can access either technical-facing or customer-facing articles).			
FR-11.6	Create KM Entries from other Modules	The ITSM Tool must include functionality that allows users to create knowledge management entries from incident, problem, request fulfillment and change modules.			
FR-11.7	Article Lifecycle Management	The ITSM Tool must include functionality to manage full life cycle of knowledge articles through administration capabilities (e.g., submission, editing, review, approval, publishing, usage monitoring, etc.).			
FR-11.9	Rich-text Editor	The ITSM Tool must provide a rich-text editor (RTE) that supports links within documents, document-to-document links and attaching images to documents.			
FR-11.10	Automated Administration	The ITSM Tool must provide automated administration capabilities, including ease of adding, editing and maintaining the data, and ability for end-user submission to require review/approval prior to posting.			
FR-11.11	Graphical Workflow	The ITSM Tool must include functionality that allows users to define workflow process for reviewing and approving pending knowledge articles that can be displayed graphically.			
FR-11.12	Mandatory Template Fields	The ITSM Tool include functionality that allows authorized users to make certain fields in the knowledge article template mandatory.			
FR-11.13	Embed Web Links, Images and Objects	The ITSM Tool must include functionality that allows users to embed Web links, images and objects into knowledge articles (e.g., screenshots, etc.).			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-11.14	Search Capability	The ITSM Tool must include functionality that allows users to search across all sections of a knowledge article from a single search field.			
FR-11.15	Feedback Mechanism	The ITSM Tool must include functionality that allows users to provide feedback to rate/score content for usefulness related to the inquiry.			
FR-11.16	Knowledge-Centered Support	The ITSM Tool must be able to provide knowledge-centered support (KCS) standards and guidelines based Knowledge Management system.			
FR-12.1	Problem Records	The ITSM Tool must include functionality that allows users to create, update, and close or cancel problem records.			
FR-12.2	Problem Record Creation	The ITSM Tool must enforce required fields to be populated, and that all fields are populated with the intended data type and format as incident records are created and modified.			
FR-12.3	Information Capture	The ITSM Tool must include functionality that allows users to enter free text, screen captures, and file attachments for the recording of problem descriptions and resolution activities.			
FR-12.4	View Impacted CIs	The ITSM Tool must include functionality that allows users to view impacted CIs from within a problem record, and to view upstream and downstream affected CIs and services through a visual depiction.			
FR-12.5	Time Tracking	The ITSM Tool must include functionality that allows users to track the time that a problem was in a specific status during its lifecycle (e.g. initial diagnosis, investigation, resolved), and how long a problem was assigned to each resolver group in the case of reassignment. This information must be available in the software's UI and via reports.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-12.6	Link Problems to Services/CIs	The ITSM Tool must include functionality that allows users to link problems/known error records to a service(s), CIs, and group of CIs.			
FR-12.7	Problem Categorization	The ITSM Tool must include functionality that allows users to categorize changes based on a standard categorization scheme.			
FR-12.8	Problem Prioritization	The ITSM Tool must include functionality that allows users to prioritize changes based on a standard prioritization scheme that is derived from the assessment of business impact and business urgency.			
FR-12.9	Problem / Known Error Differentiation	The ITSM Tool must include functionality that allows users to differentiate between problems and known errors.			
FR-12.10	Task Assignment	The ITSM Tool must include functionality that allows users to assign tasks to groups or individuals to be accomplished within a specified time frame. The ITSM Tool software must notify the assignee of the task and due date and the associated problem record.			
FR-12.11	Cause Codes	The ITSM Tool must include functionality that allows users to use configurable cause codes as input to categorizing a problem.			
FR-12.12	Closure Codes	The ITSM Tool must include functionality that allows users to use configurable closure categorization codes upon problem closure.			
FR-12.13	Self-Service Portal Integration	The ITSM Tool software must include integration with the self-service portal, allowing users to view problems and their status.			
FR-12.14	Incident Management Integration	The ITSM Tool must include integration with Incident Management allowing for the linking of incident records to problem records in order to provide full visibility into incidents caused by problems and the impact of problems on the business users.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-12.15	Change Management Integration	The ITSM Tool must include integration with Change Management allowing for the creation of a change record to resolve a problem and to view changes that may provide input to resolve problems.			
FR-12.16	Service Asset and Configuration Management Integration	The ITSM Tool must include integration with Service Asset and Configuration Management allowing for the linking of problem records to CI records in order to make CI information readily available to assist in the classification and prioritization of problems and to allow visibility into problems associated with a CI or set of CIs.			
FR-12.17	Knowledge Management Integration	The ITSM Tool must include integration with Knowledge Management allowing for the documenting and managing of knowledge articles pertaining to a problem and publishing of end-user based FAQ's and supporting reference documents within the knowledgebase.			
FR-12.18	Knowledge Base Reporting	The ITSM Tool must include functionality that allows users to report on the number of proposed solutions, most used solutions, and least used solutions in the knowledgebase.			
FR-13.1	Release Records	The ITSM Tool must include functionality that allows users to create, update, and close or cancel release records.			
FR-13.2	Related Changes	The ITSM Tool must include functionality that allows users to log a release so that changes can be identified and related to the release.			
FR-13.3	Release Record Capture	The ITSM Tool must include functionality that allows users to capture the release date and time, identify who will be implementing and link resources to the release.			
FR-13.4	Attach Documents	The ITSM Tool must include functionality that allows users to attach and store documentation with the release record.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
FR-13.5	View Impacted CIs	The ITSM Tool must include functionality that allows users to view impacted CIs through the related change records.			
FR-13.6	Task Assignment	The ITSM Tool must include functionality that allows users to assign tasks to groups or individuals to be accomplished within a specified time frame. The ITSM Tool software must notify the assignee of the task and due date.			
FR-13.7	Change Status	The ITSM Tool must include functionality that allows users to change status of release and linked changes, release documentation and release approvals.			
FR-13.8	Change Status Notification	The ITSM Tool must include functionality to automatically notify the release coordinator when the status of a change associated with a release changes status.			
FR-13.9	Search Capability	The ITSM Tool must include functionality that allows users to search all releases by any release data attribute captured by the Tool.			
FR-13.10	Release Windows	The ITSM Tool must include functionality that allows users to define release windows (show conflicts that impact when releases can be scheduled).			
FR-13.11	Master Release Schedule	The ITSM Tool must include functionality that allows users to create and publish a Master Release Schedule.			
FR-13.12	Problem Management Integration	The ITSM Tool must include integration with Problem Management allowing for the linking of problem and known error records to release records.			
FR-13.13	Change Management Integration	The ITSM Tool must include integration with Change Management allowing for the linking of release records to change records.			
FR-13.14	Service Asset and Configuration	The ITSM Tool must include integration with the CMDB to support the association of release records to CI records.			

**Table #1 – ITSM Tool Software
Functional Requirements (FR) Mandatory Response Form**

A	B	C	D	E	F
ID	Name	FR Description	Bidder Response		
			Requirement is Met (Y/N)	Software Part #	Reference to product documentation
	Management Integration				
FR-13.15	CMDB Support	The ITSM Tool must be able to validate required information from the CMDB for release build and deployment activities.			
FR-13.16	Release Readiness	The ITSM Tool must support the establishment and governance of release readiness criteria.			
FR-13.17	Authorization Support	The ITSM Tool must include functionality that allows users to authorize and schedule release deployments in conjunction with the Change Management process.			
FR-13.18	Post Deployment	The ITSM Tool must include functionality that allows users to trace and track post deployment activities (e.g. early life support).			