

QUESTIONS AND ANSWERS
RFP # 15-004-45
INFORMATION TECHNOLOGY SERVICE MANAGEMENT (ITSM) SUITE

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We replace SDE on a regular basis. We are most certainly a fit for your requirements. **We are extending one week to May 15, 2015.**

We would like to have some discussions with your ITSM team in order to further identify their view of a successful replacement product implementation. If that is possible, please let me know. **The will be no direct discussion with vendors until the responses are returned. After an initial evaluation we will decide which vendors we want to demo their product and ask questions.**

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For example, your RFP states that you currently have 51 Concurrent users and 20 Named users. EasyVista has a licensing methodology that does not charge for “approvers”. We also have unlimited licensing for our Service Catalog access. Our system includes Asset Life Cycle Management as part of the cost of the solution.

Do you need 71 concurrent users? Or, 51 Concurrent Users? Or, 20 Concurrent users? **Your recommendation may be different, but currently the named users are for Service Desk Personnel and the concurrent users are for anyone else that uses the system.**

Are the 20 Named users on line all the time? They are ITS personnel and are normally using the system between 7 am and 5 am. Or, could those named users be part of the Concurrent user count? Only if the concurrent user count is high enough. Do you run in shifts? **There are no shifts. The after-hours persons responds to calls between 5 pm and 7 am. Is there overlap?**

Would you consider a SaaS implementation? Or, do you have to have an On Premise Implementation? We do both. **We are seeking an on Premise solution.**

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These are the specific questions we need to ask in order to give you an accurate proposal response. **We will respond to all written questions.**

Hi Nelson..is there a third document or download ? Maybe an excel sheet for response to the technical requirements?

There is a proposal response cover sheet on our web site but no Utilization report. The utilization report should have been deleted.

Below are our questions for the Information Technology Service Management (ITSM) Software - RFP # 15-004-45.

1. On page 29, Section C- Proposal Format, 3. Cost and Fees it request that cost shall be provided in a separate envelop from the proposal. Is also required to have one original, six copies, and one electronic copy of the cost proposal as well?

Yes

2. On page 11, Service Desk Section. It states that you currently own 20 named licenses and 51 concurrent licenses. Is this the license count that County to intend for the new ITSM solution? How many Help Desk Technicians does this license count support? We assume that the 20 named licenses are for Tier 1 Support and the 51 concurrent are for the Tier 2/Tier 3 and Managers. Please provide additional clarification.

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3. Please provide clarification on the training requirements. How many ITSM solution administrators do you intend to provide training? Do you require end user training? If so, how many users?

Depending on the requirements and needs of the ITSM solution, we will need training provided to at least 2 system administrators. We will require end-user training but are open to a “train the trainer” model. There are roughly 80 users in ITS.

4. 1.1.4 – Contact History - An easy-to-read log of all calls the end user has previously had with the Service Desk. This includes analyst notes, as well as escalation and resolution history. Such records must be available for each end user within the enterprise, and they must be kept in a central repository.

Don't see a particular question here.

5. 1.1.8 – Self-Service - The County wishes to allow end users the ability to enter their own incidents/requests online through a Web-based interface. This would also allow end users to check status of open calls and provide additional information when necessary. Shelby County would also like to fulfill other requests such as password resets, etc. using the web-based interface. Does the county wish to have the solution provide password reset functionality for the end-user, or provide the functionality fort an end-user to request a password reset? If the former, does the county currently use an identity management system that it intends to integrate with the new ITSM solution?

We would like the ability to integrate the ITSM tool with other applications or web services such as MS Active Directory for password resets.

6. 1.1.9 – Enterprise Mobility Management – Centrally manage mobile devices such as smartphones, mobile phones, netbooks and tablets. Multi-OS support. Supports Enterprise Mob. Does the county currently use a Mobile Device Management solution? If so, what is that system and is there an intention on integrating this system’s data repository with the proposed new ITSM solution? Can the county provide a further detailed list of features and functions they require with regards to Mobile Device Management?

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7. 1.1.10 – Remote Control – Describe standard methods available for an integrated troubleshooting function which will allow authorized IT staff to access and control all systems on the network. This includes, but is not limited to, servers, clients, laptops, and user-free systems. Does the county currently use a remote access application (e.g. Bomgar or similar)?

ITS currently uses a combination of RDP, Dameware, and SCCM for remote access to end-user workstations.

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The easy entry of new knowledge into the ITSM knowledgebase. Should be able to create, edit, and publish new content easily.

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12. 1.10.1 – Calendar – The system should use a native (or integrated with an existing calendaring system, e.g. Outlook) calendar. The calendar allows for the entry of appointments, scheduling tasks, inputting special dates and appointments, etc. Ideally the calendar should synch with existing calendar/email software already in use. What is the existing calendar/email software in use?

We are currently migrating to Outlook 2010.

1. How many authorized users will have access to the system - Users include 1st level, 2nd level technicians etc., and other users who log into the application? Of those, How many are concurrent users?

We currently have 20 named users which are primarily Service Desk personnel and 51 concurrent licenses which are primarily Tier 2 and 3 users in the Customer Support, Applications, or Technical Support groups.

2. Our proposed product is based on Concurrent Licenses. How many maximum Concurrent users anticipates to be logged in to the Application at any given time.

Based on our current licensing structure, 71.

- 3 What is the current Service Desk software in use?

BMC's Service Desk Express (SDE) v10.2

- 4 What are the reasons for changing the software in use? Any Current pain points or financial obligations.

BMC has announced that only limited support is available for SDE after May 2015.

- 5 When does the maintenance on the current system expire?

June 30th. Renewable to 2017

6 Does the project involve any kind of data migration of existing tickets from the current system to the new system **No.**

7 Is there any Asset Management tool in place currently and does the project involve any integration with any asset management systems.

ITS is planning to implement Kace VK1000 and VK2000 asset management solutions and does desire integration between that solution and the ITSM tool.

8 Is there any allocated budget for this project? **Yes.**

9 Is there any time frame for implementing the project? Estimated dates for selection of the product and implementation. Anticipated Go Live Date.

10 Does the project involve integrations with other 3rd party tools? Please explain the possible system integrations

It is anticipated that the Dell Kace discovery tool will populate the CMDB via a one-way integration

11 How many technicians (1st, 2nd, 3rd Level Support, anyone who works on tickets) do you anticipate using this tool concurrently?

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12 Do you currently have a Configuration Management Database (CMDB) in place and, If so, which CMDB?

a) Will legacy data from the existing CMDB (if it exists) be transferred to the new CMDB?

Not a true CMDB. We use the Service Desk Express Configuration Management to manage CI's.

a) **Limited. CMDB will primarily be populated by discovery tools and a full physical inventory**

13 Do you currently have a Knowledge Management tool in place? If so, which tool Are you using?

No.

14 Does the project involve any asset discovery and inventory? Does Shelby County have any tools currently in use for Asset discovery?

The new asset management solution will include tools for asset discovery.

15 Is integration with any Network Management tools in scope for the project? If so to what extent.

No

16 Does the project have any established time frame for the implementation of the project?

17 What is the current facilities management software in use?

18 Are there any other stakeholders besides the IT department that would be involved in the decision making process? No

19 We offer both On-premise and SaaS models. Which one these are you looking for?

We are looking for an on-premise solution.

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1. The software we are positioning uses a concurrent license model only, how many concurrent licenses would you suggest vendors that have this model propose? At least 75.
 2. For services pricing what processes and integrations should we provide costing for (ex. Incident, Request and Change plus integration with Active Directory and email). We need pricing for such things as printers, PCs, etc. that are inventory. We not be pricing all services, but we will pricing and billing for services such as Telecom.
 3. Do you have a preference for a SaaS (Hosted) or an on-premise deployment? On-Premise
 4. Item 1.1.9 states “Enterprise Mobility Management - Centrally manage mobile devices such as smartphones, mobile phones, netbooks and tablets. Multi-OS support. Supports Enterprise Mobility and BYOD”. Can you please provide more clarification as to what capability this item is asking for? This feature is primarily targeted at providing field-service technicians with the ability to remotely access the service-desk solution, view, update and close their assigned incidents. Some technicians prefer to use BYOD and the County will shortly be implementing AT&T Toggle for BYOD mobility management.

5. For Item 1.1.10 Remote Control. Do you currently have existing Remote Control/Access technologies in place today? RDP, Dameware, Microsoft SCCM 2007. **We plan to replace SCCM 2007 with Dell KaceVK1000 and VK2000 within the next two to three months**
6. Item 1.2.1 states “Call Management - Managing the information processes, and systems used to control the flow of customer requests in and out of the Service Desk. Call management processes apply solely to end user requests received by telephone.” Can you please clarify what you are asking? **The functionality that is needed is the management of processes and workflow associated with an end-user calling the Service Desk for assistance. The call may be resolved by the person taking the call without the need to hang-up and call back (FCR first call resolution). If a first call resolution can't be obtained then the call is routed to the proper person for resolution and then back to the service desk personnel to close the incident. Workflow is needed to manage calls other than FCR.**
7. For item 1.3.9 Interactive Support, do you currently have an existing Chat product today? **No.**
8. Item 1.4.3. states “Personalization - Using continually adjusted user profiles to match content or services to individuals, personalization includes determining a user’s interests based on his or her preferences or behavior, constructing business rules to select relevant content based on those preferences or behaviors, and presenting the content to the user in an integrated, cohesive, and meaningful format.” Can you describe what you are asking for here? **This is not a typical ITSM functionality item. This is the web portal functionality where some of the content presented to the user is based on some of the serviced available for use by the end-user, previous incidents, previous searches, etc. This would work in the same way Google presents ads and YouTube recommends videos based on viewing history.**
9. Item 1.6.5. “Remote Knowledge Management Tools System must allow for the saving and retrieval of information, documents, best practice methodologies, templates, libraries, and other pertinent information. Hierarchical views of the entire enterprise, knowledge repositories, company policies, corporate handbook, and collaboration are available remotely.” Please clarify what functionality you are asking for? **The functionality should provide the ability to store documents and make them available via a self-service portal.**
10. Item 1.7.3.”Inference Engine The part of the Service Desk software solution responsible for drawing new conclusions from the current data and rules.” Please clarify what functionality you are asking for? **The Inference Engine will evaluate event monitoring to determine if there are issues the Service Desk needs to address or to notify other ITS sections of issues.**

11. Item 1.7.5. “Integration with MS Office Tools Allows users to create files within the MS Office suite of products and import/export them to the system, or integrates seamlessly with the products themselves.” Please clarify what functionality you are asking for? **The functionality is the ability to create, read, import and export Office documents while using the ITSM application.**
12. Item 1.12.6. “Equipment Management The proposed solution should be able to allow for the management, tracking, and booking of company equipment (both online and off-line) through the Service Desk software solution.” Please clarify what functionality you are asking for? **The functionality is to manage equipment (inventory). This functionality would also allow end-users to temporarily check out and/or schedule equipment such as laptops, projectors, etc. and return when need is over.**
13. Item 1.12.7. “License Management Contracts and license management repository; should track license needs based on unique usage criteria; enables license transfers; includes change alerts and renewal notifications, method for creating policy and entitlement documents, with controls or alerts to help enforce; must include ability to track Oracle and Citrix licenses.” Please clarify what functionality you are asking for? **IGNORE THIS REQUIREMENT**
14. Item 1.12.9. “Purchasing Module Requires a purchasing module for IT which includes information sharing and workflow with ITSM and ITAM product.” Please clarify what functionality you are asking for? **IGNORE THIS REQUIREMENT**
15. Item 1.15.7. “In-House Based The Service Desk application should be an in-house solution.” Please clarify what you are asking. **The proposed solution should be On-Premise.**

1. Page 4, Section II. MINIMUM PROPOSER REQUIREMENTS
 - Item 6. A written statement of compliance to Title VI in your response.
 - May we please receive confirmation that the document attached to this email, “Shelby County Government Title VI Acknowledgement”, is the necessary document to be signed for compliance? If not, could you please provide the correct document or instructions to download the correct document?
All that is required is a statement such as “Vendor adheres to all Title VI requirements and will provide proof/documentation if necessary.”
2. Section 1.1.2 Contact Management
 - Will data be managed from Avaya or from a CRM? Will the Service Desk tool also be used as a CRM?
The ITSM tool will be used as our CRM in many aspects. It should allow ITS to manage contact information and provide a centralized view of user data including call history, incidents, and problems.

3. Section 1.1.6. Activity Management
 - Are reports required?
The ability to run reports on analyst activity is desired.
4. Section 1.4.3. Personalization
 - May we please have a further explanation of this requirement? Is the requirement that they be related to Active Directory or Sharepoint profiles? Must it be a dashboard? Must it be dynamic based on the users themselves or their profiles?
This refers to the ability to customize the content views and particular activities/services available based on the user's profile in the ITSM tool.
5. Section 1.4.5. Content Management
 - What type of information does this requirement refer to? Do you require an information banner or outage information?
This refers to the ability to publish information both internally to ITS users on the Service Desk and to external customers. Information could include outages and general notifications.
6. Section 1.7.3. Inference Engine, 1.7.4. Document Management, 1.7.5. Integration with MS Office Tools
 - Is the requirement an Electronic Data Management (EDM) Software integrated with the Service Desk or that the Service Desk will also be an EDM tool?
Either approach could work. We need the ability to create, edit, and publish knowledge articles. Analysts should be drawn to particular knowledge articles based on other calls or incidents of a related nature.
7. Section 1.9.4. Automatic Roll-Up/Drill Down Capabilities, 1.9.5. Forecasting/Planning Tools, 1.9.6. Dashboard for Key Indicators
 - May we please receive further details regarding these requirements? What are the specific expectations?
We are looking for the ability to view data in a very detailed report or at a higher, more executive friendly view. We also need the ability to utilize past data to help the support future decisions, such as call volume and resource planning.

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These are the specific questions we need to ask in order to give you an accurate proposal response. **We will respond to all written questions.**

Our company submitted the required applications last week for a Vendor Number and an EOC Number. We have confirmed with Shelby County by phone that both applications have been received. However, the Vendor/EOC numbers have not been generated yet and we have been advised that the EOC number could take up to 45 days, although will likely be generated sooner.

Please advise if it is acceptable, in the interim, to enter “Applied” or similar in the Vendor # and EOC # fields of the Proposal Response Cover page.

We know the EOC process can be long so we have made adjustments to the bid submittal process. If you have applied for an EOC number with our EOC department prior to the bid opening of 4:00 pm, Friday, May 15, 201, we will accept your bid pending EOC approval.

Also, the above statement is in the bid document at the top of page five under “Note”.

5) A performance bond in the amount of 50% of the amount of the contract is required from the successful contractor.

Questions - Would Shelby consider a response that did not adhere to the 50% performance bond?

A performance bond in the amount of 50% of the contract sum will be required from the successful bidder. We will not consider any response that does not or cannot meet this requirement.

Question 1 - Has Shelby County reviewed FootPrints v12. It's a recent release that seems to fit the requirements in this bid. It's also a virtually free upgrade since you are an SDe customer? (Services not included)

We took an extensive look at FootPrints v12. The Service Desk personnel felt like it made the process for creating Incidents more cumbersome than the process in SDE. There seemed to be quite a bit of custom development that would be needed. It was not out of the box ready. There was some functionality that just didn't work.

1.15.7. In-House Based

The Service Desk application should be an in-house solution.

Question 2 - Would Shelby county be open to a SAAS based solution? **No. We are interested in an On-Premise solution.**

1. Can you send me the answers to any questions that have been submitted?

2. I know we are registered with the county but I cannot find a location on the website to look up our Vendor # or to see if we are current. I have the following EOC number:

The company is IT Prophets, LLC and our EIN is #####

Questions and answers will not be posted today. We have 48 hours from the last day to answer questions to post questions and answers to our web site.

Your vendor # is ##### but your EOC number has expired. Please get in touch with Vali Sweet at 901-222-1100 or e-mail her at vali.sweet@shelbycountyttn.gov to find out what needs to be done to receive a current number. I you do not have a current number or have applied for a number prior to the bid opening your bid will be rejected.

- Per our phone conversation Tuesday, we felt as a group that the time frame would have been excessively tight for responding to such a well-structured RFP in that short amount of time. The soonest we could put together a quality proposal would be 22 May. **Can't extend the date past may 15, 2015.**
- We would need to know, at the outset, if Shelby county was open to or even pre-disposed to looking at a SaaS solution vs. on premise. This point of clarification is essential as it would effect what we would put together. **We are only interested in an On-Premise solution.**
- We would also want to know your existing consultative partners for this project. If you do not have one and were open to working with someone we would recommend, it would make our response much easier as we work through business partners as an extension of our consulting services. **We are not working with a consultant for this project.**

And lastly, the amount of consulting and knowledge transfer for a solution of this size should make this project sizeable for any vendor. We wanted to know if this was a funded project of if the RFP would lead to a consideration for the next funding cycle. **We do have funding for this project.**

1. For Professional Services/Implementation cost estimates what processes and integrations should we provide costing for (ex. Incident Management, Services Request Management, Change Management etc. plus integration with Active Directory and email)?

I'm not sure how to answer. I better understand the question now, but we are interested in the professional services to implement everything listed in the RFP. If there is functionality listed in the RFP that your company does not provide please indicate in your response. If there is functionality that requires "custom Development" instead of "configuration" please note that as well. Since no one else has asked this question I'm expecting everyone to quote a price for what's presented in the RFP based on the functionality they can provide, as part of the contract negotiation we may decide not to implement some things. I am including the integrations that I am aware of.

Integration with Email and Active Directory Integration with Dell Kace.

- How many system licenses are needed?

We currently have 21 named users and 51 concurrent users with Service Desk Express. Our Service Desk Personnel currently use the 21 named user licenses. The 51 concurrent licenses are shared across the other 70 ITS personnel as well as another 10-15 users outside ITS.

- Which ITIL processes will be implemented as part of Phase 1?

We are interested in initially implementing the following ITIL processes:

- Event Management
- Release and Deployment Management
- Request Fulfillment Management
- Service Catalog Management
- Service Portfolio Management
- Service Level Management
- Incident Management
- Change Management
- Problem Management
- Knowledge Management

I spoke with someone in the Purchasing department yesterday and they told me that the RFP deadline had been extended again until May 22 and that the deadline for questions would be Friday, May 15 at midnight.

I do not see any addendums for this yet, however. Could you please confirm that this is correct? **That is correct and there are no addendums. We extended the due date to give vendors more time to bid.**
