

## Attachment Y SaaS ITSM Demonstration and Scenarios

### Demonstration and Oral Presentation Agenda

In accordance with Section 1.16 of the RFP, each Presenter will be provided a **3 hour** time period to discuss their proposal and to demonstrate their solution to the Evaluation Committee. Two screens, projectors, and Internet connections will be provided upon request to facilitate the demonstration. As stated in Section 1.16, this time period will be divided into several parts:

1. **Demonstration 1 (30 minutes): showing that the proposed solution meets the Minimum Requirements.** This will be accomplished by successfully completing all elements described in Scenario 1 in this document. Should the system demonstration fail to pass all elements of Scenario 1, the Demonstration and Oral Presentation will be terminated and the proposal shall be deemed not susceptible to award.
2. **Oral Presentation (one hour):** Offeror will be provided the opportunity for a 30 minute presentation, followed by a 30 minute question and answer period. The presentation and follow-on questions may cover any aspect of the Offeror's proposal.
3. **General Presentation (one hour):** During this time, Offerors are encouraged to demonstrate the enterprise functionality of their proposed System. The demonstration should cover, but is not limited to the areas listed below:
  - Knowledge Base (Build and Maintain);
  - Service Catalog (Build and Maintain);
  - Standard Reporting;
  - Ad hoc Reporting to include collecting and reporting information related to different groups of customers;
  - Asset management;
  - Service level management;
  - Discovery and Network Management;
  - Configurable "dashboards";
  - Configurable "e-mail notifications" – incoming and outgoing;
  - Functions included in the self-service portal
4. **Perform Scenarios (90 minutes) – Business Processes – During this time period, Offeror will demonstrate the following scenarios:**
  - Demonstration 2 On-Boarding process
  - Demonstration 3 Discovery and License Management
  - Demonstration 4 Asset Management

## Minimum Requirements Demonstration

Offerors shall configure the demonstration to illustrate the following scenarios.

Scenario Name:	<b>Minimum Requirements Demonstration</b>
Demonstration #	1

## Background

This Scenario shall be performed at the beginning of the Demonstration to verify that the System meets Minimum Requirements. Failure to successfully execute this Scenario will result in the cancellation of the remainder of the presentation.

This Scenario will follow the steps provided below:

Step #	Req Ref	Action	Pass/ Fail	Comments
1	MINREQ - 001	Vendor attests in Comments that no User or administrator interaction requires use of an interface other than a Web Browser. Any required use of other than a Web Browser during System Demo will fail this Step.		
2	MINREQ - 002	Save one of each in the System: <ol style="list-style-type: none"> <li>1. Incident</li> <li>2. Problem</li> <li>3. Asset</li> <li>4. Service Level Agreement</li> <li>5. Knowledge Base Article</li> <li>6. Service Catalog Item</li> <li>7. Change Management Request</li> </ol>		
3	MINREQ - 003	Using a Customer Account, go to the Self Service Portal and: <ol style="list-style-type: none"> <li>1. Create an Incident</li> <li>2. Create a Service Request</li> </ol>		
4	MINREQ - 004	Using same account as in step 3, view Incident and Service Request that were just created.		
5	MINREQ - 004	Using same account as in step 3 access the Knowledge Base and an article in the Knowledgebase.		
6	MINREQ - 005	Access and use a feature of the system that generates an email to a User		

7	MINREQ – 005	From a Customer email account, send an email to the system demonstrating any function (create service request, work requests, close existing service request)		
8	MINREQ – 006	Bring up an input form in the System that has both required and optional fields. Fail to fill in a required field and attempt to save the record. Save action should fail		
9	MINREQ – 006	Bring up an input form in the System that has both required and optional fields. Fail to fill in an optional field (fill in all required fields) and attempt to save the record. Save action should succeed.		
10	MINREQ – 007	Bring up an input form with Alphanumeric, Numeric and Date Fields. Insert incorrect values in the following field types and verify that the record fails to Save. <ul style="list-style-type: none"> <li>• Numeric</li> <li>• Date field</li> </ul>		
11	MINREQ – 008	View a record from the following record types and display the unique identifier: <ol style="list-style-type: none"> <li>1. User</li> <li>2. Customer</li> <li>3. Incident</li> <li>4. Problem</li> <li>5. Service Request</li> <li>6. Asset</li> <li>7. Knowledge Article</li> <li>8. Service Catalog Item</li> <li>9. Service Level Agreement</li> <li>10. Change Request</li> </ol>		
12	MINREQ – 009	Demonstrate, on a screen or in a report, the ability to Link an Incident to a: <ol style="list-style-type: none"> <li>1. Customer</li> <li>2. User</li> <li>3. Asset</li> <li>4. Configuration Change</li> <li>5. Knowledge Base Article</li> </ol>		

13	MINREQ – 009	Demonstrate, on a screen or in a report, the ability to Link a Problem to a: <ol style="list-style-type: none"> <li>1. Customer</li> <li>2. User</li> <li>3. Asset</li> <li>4. Configuration Change</li> <li>5. Knowledge Base Article</li> </ol>		
14	MINREQ – 010	Access the Reporting System and provide an example of a Standard report.		
15	MINREQ – 010	Access the Reporting System and create and save an Ad Hoc report		
16	MINREQ – 011	Using an existing report in the System, perform the following actions: <ol style="list-style-type: none"> <li>1. Edit the report</li> <li>2. Save the edited report</li> <li>3. Share the Report with another User</li> <li>4. Print the report (sufficient to demonstrate that the capability exists in the System) using user print profile</li> <li>5. Generate a report in PDF, XML and CSV formats.</li> <li>6. Show option to export report / file or email the reports from the system.</li> </ol>		
17	MINREQ – 012	Demonstrate the creation of a Workflow having the following characteristics:		
18	MINREQ – 013	Have a User access a Knowledge Base Article that is restricted to use by Users, not Customers. Using a Customer account and the Self Service Portal, demonstrate that a Customer cannot access this article.		
19	MINREQ – 014	Demonstrate a User logon using Single Sign On and the use of complex passwords (3 of the 4 criteria = Upper, lower, number, special character) and minimum of 8 characters		
20	MINREQ – 015	Demonstrate a User logon using a group member profile and permissions.		

21	MINREQ – 016	Demonstrate that IT assets and non-IT Assets can be stored in separate CMDBs		
22	MINREQ – 017	Demonstrate, through documentation and past experiences/examples that the ITSM system offered meets SOC2 requirements for security controls.		
23	MINREQ – 018	Demonstrate that the ITSM system offered to subscribers is within 2 releases of the most current ITSM system available; this can be accomplished via release notes and dates and information available online.		
24	MINREQ – 019	Demonstrate that there is a corporate policy that the ITSM system source code is escrowed and stored offsite with each major release.		
25	MINREQ – 020	Demonstrate that there are online tutorials and training manuals for the ITSM system for basic system operations, maintenance and users, in addition to available training programs (with syllabus) for train the train and end user curriculum.		
26	MINREQ – 021	Demonstrate, through documentation and past experiences/examples that the ITSM system is cloud based and fully supported by vendor, and if on premise platform is required, the platform supports the most recent versions of Microsoft SQL Server and Oracle and the Microsoft Windows 2012R2 platform.		
27	MINREQ – 022	Demonstrate that the ITSM system supports and compatible with IE 9, Chrome, FireFox and Java 6.24 as well as newer versions of browsers and Java.		
28	MINREQ – 023	Demonstrate that the ITSM system is capable of sending messages, reports, status updates and alerts via email and text messaging and configurable by type of notification and user preference.		

Scenario Name:	<b>Onboarding New Staff</b>
Demonstration #	2

## Background

A new hire needs all of their technology resources available on the first day to perform training and increase productivity.

### For the vendor demonstration:

#### Process Name: IT Onboarding using self-service portal

**Description:** A supervisor uses the self-service portal to create a service request for a new hire. This includes; name of supervisor, new employee name, and office location. The location is required to provision phone and computer before the arrival of the new hire. A new service request is created with three assignments (create accounts, provide appropriate technology hardware/software resources, and provides desk phone). The assignments can be completed in any order. The service request cannot be closed until all three assignments are closed.

Step No.	Requirement Reference	Description
1	MINREC - 003, GEN - 014, SC-006, MINREQ - 012	<p>Using a self-service portal, supervisor initiates service request and selects resources</p> <ul style="list-style-type: none"> <li>• New hire name</li> <li>• Location (building and desk location)</li> <li>• Identifies IT equipment preference (desktop or laptop)</li> <li>• Identify required software applications (menu selection and/or comment box for special ad-hoc requests).</li> <li>• The new hire requires access to AOC remote access and restricted system (ex. access to the AOC financial management or AOC personnel system), additional authorization signatures would be required.</li> <li>• Depending on selection, System automatically sends appropriate notification requests via email to:                             <ul style="list-style-type: none"> <li>• Security (for notification of user requiring remote access and to send Security Policy information for review)</li> <li>• Infrastructure Services provisioning (for subnet, port and IP address assignment, remote access assignments, phone provisioning)</li> <li>• Owners and authorizers for the restricted systems authorization, establishing ID and logon credentials, etc.</li> </ul> </li> </ul> <p>Explain how that workflow would be accomplished and documented.</p>

2	GEN - 015, MINREQ -012	Automatically create work request 1 – notify Security (Create Active Directory (AD), e-mail accounts and sign on profile, remote access, and send Security Policy information for review.
3	GEN - 015, MINREQ -012	Automatically create work request 2 – to Service Desk to assign technician to provision hardware and software.
4	GEN - 015, MINREQ -012	Automatically create work request 3 - Infrastructure Services provisioning (to determine subnet and port, IP address assignment, remote access assignments, phone provisioning)
5	MINREQ - 008, ITAM-001, ITAM 002	Assign computer from available assets listed in CMDB and modify record to reserve asset for technician for this user
6	MINREQ -012	Close assignment 1 - Create AD and email accounts
7	MINREQ -012	Close assignment 3- Provision network connections and configuration
8	MINREQ -012	Technician assigned checks out equipment from storage using bar code scan (assume equipment already has barcode); provisions end-user hardware and software; installs equipment for end-user; configures for and connects to network; tests; uses scanner to indicate that equipment is installed; emails user receipt for equipment; end user electronically signs receipt for equipment and returns via email; CMDB is updated; notice is sent to Asset Management that equipment has been installed. Close work request #2.
9	MINREQ -012	Close service request only after all assignments have been closed
10	MINREQ - 005	Email notification of closed service request sent to end user and supervisor who originated the request.

Scenario Name:	<b>Discovery and License Management</b>
Demonstration #	3

**Background**

AOC’s Service Desk is responsible for fulfilling user requests for installing software applications once the installation is approved. The purpose of the demonstration is to demonstrate the agent-less discovery capability of the ITSM system, what information is collected and populated in the CMDB, how it displays the information that keeps tracks of installed licenses in relation to authorized subscribed licenses and what workflows can be triggered to assist the Service Desk in communicating with the end requestor and the requestor’s supervisor, utilizing the CMDB in an efficient manner, closing the original request and opening a new request to procurement to alert them that the specific software license is at its maximum count with the new installation.

**For the vendor demonstration:**

**Process Name: User request for software installation.**

Step No.	Requirement Reference	Description
1	MINREQ - 003; MINREQ - 012; MINREQ-015; SS-001;	Customer uses Self Service Portal to request a copy of an application software (e.g., Adobe Acrobat)
2	MINREQ - 012; MINREQ-008	The System assigns a tracking number for the request.
4	MINREQ - 012; MINREQ-013	Referring to the user table regarding permissions for software requests, the System recognizes from the user profile that the user is not approved to automatically receive the software.
5	MINREQ - 012; MINREQ-023;	The System, accessing the information from the user profile, obtains the name and email address of the supervisor who can authorize the request, and routes the request via email to their supervisor to obtain approval before any further action is taken.
6	MINREQ - 012; MINREQ-023;	The Supervisor receives an email from the System and returns the request with approval to the System via email with a copy to the end user for their information.
7	MINREQ - 012; MINREQ-023;	The Service Desk then opens the approved request, begins the process for license verification and installation for the user; an email has been sent to the user that the request is in process of being fulfilled (and any other instructions that are necessary – for example, a knowledge base stored business process SOP that describes the next steps).
8	MINREQ - 012; CMDB-001	The Service Desk initiates a CMDB check for the software and notes that the Enterprise has consumed all of their licenses.



9	MINREQ - 012; MINREQ-023; R-013; ITAM-006; DNET-001; CMDB-001; ITAM-006	<p>Service Desk uses the ITSM Discovery tool to check the Enterprise to verify that License count on desktops across the network exceeds the current licenses purchased.</p> <p>Note: the Discovery tool would keep a copy of the query, listing all current licenses installed with user names. At the same time, the Service Desk verifies that all existing copies of Adobe are licensed for the Enterprise. This information would be reflected in the report from Discovery.</p>
10	MINREQ - 012	Service Desk sees that the updated installed license count has been revised to show that the count is -1 under the maximum number of licenses. The Service Desk now has System permission to proceed to install the software.
11	MINREQ - 012; GEN-020	Service Desk initiates a remote desktop sessions to load the software for the user (note: this may require permission from the user to access their desktop and a request via email to be sent to the user to arrange a time when convenient).
12	MINREQ -012; CMDB-002	Once the installation is completed successfully, the service request is closed, completed, an email notification is sent to both the user and supervisor and the CMDB is updated automatically with the user license information and count with the new installation.
13	MINREQ -012;	In this specific instance, however, the Service Desk now issues an incident request to purchasing that the number of licenses for Adobe Acrobat is at its maximum and that a procurement needs to be processed before more licenses can be installed. The Discovery report noted above is attached for procurement's information (perhaps there are users listed who are no longer employees of the Enterprise).

Scenario Name:	<b>IT Asset Management</b>
Demonstration #	4

**Background**

AOC has two groups who are responsible for delivery and inventory of IT assets throughout the judicial community. Just as the use of bar code technology is extremely critical to the efficiency of keep track of IT assets, the business process to support the transfer to minimize data entry is as important.

AOC is responsible for fulfilling those requests and installing the equipment at the District and Circuit Courts. This entails transferring assets from storage to operations and different install teams (and different organizations servicing District and Circuit Courts) are required to process the request.

**For the vendor demonstration:**

**Process Name: Process for Asset Management receiving new hardware for fulfill request.**

The purpose of the demonstration is to demonstrate the delivery of 5 new PCs from a vendor at a District Court warehouse in response to 5 work requests (“tickets”) for 3 Circuit Court users and 2 District Court users; the equipment is transferred to Service Desk for provisioning and installation, updating ITSM during the process during changes of custody and final installation.

Background for demonstration:

- 5 user work requests and one order placed with vendor already in ITSM System.
- JIS warehouse location: C22-11
- District Court warehouse location code: D22-11-01
- JIS Technician location: C33-11
- Destination code for 3 PCs to be located in Circuit Court location: C01-04
- Destination code for 2 PCs to be located in District Court location: D01-04-01
- Technician assigned (using AD)
- For simplicity in this demonstration, it is assumed that this is a replacement PC
  - Security has already approved the installation
  - User AD is already assigned
  - Infrastructure Services have already assigned subnet and IP address.
  - Work request and procurement / order linked to work request already placed.

Step No.	Requirement Reference	Description
1	MINREQ - 012; ITAM-004; ITAM-011; ITAM-019	Vendor delivers 5 PCs to District Court warehouse. Warehouse personnel affix appropriate bar code to equipment (D001, D002, C001, C002, C003) and scans each PC, entering related procurement PO number and work request ticket for user(s), with location code for warehouse/storage (D22-11-01)
2	MINREQ - 012; ITAM-013; ; CMDB-004	Scanned information is used to populate CMDB, recording all pertinent information concerning equipment specifications and current location info.
3	MINREQ - 012	Action from step 2 above triggers notification to procurement that equipment has been received. Note: discuss how partial deliveries from purchased order could be handled.
4	MINREQ - 012	Action from step 2 above triggers notification to Service Desk that equipment has been delivered, referring to information from 5 original work requests and indicating ready for delivery.
5	MINREQ - 012; RES-003	Service Desk assigns technician(s) and requests delivery to JIS technician location (C33-11).
6	MINREQ -012; ITAM-004; ITAM-014;	Warehouse delivers equipment to C33-11, scans bar code and updates location with technician location; ITSM generates an email receipt for technician to acknowledge and electronically sign; email receipt is signed and sent to ITSM; the electronically signed email receipt is recorded by CMDB with new location code; ITSM advises AM of changed location.
5	MINREQ - 012; RES-004; RES-005	Service Desk Technician(s) provision equipment with list of applications listed on work request; work request is updated and provides scheduled install date that is included in notification to intended recipient listed in work request. User acknowledges install date and ITSM updates schedule (to be included in resource calendar).
6	MINREQ -012; CMDB-001; CMDB-002	Service Desk technician installs equipment and uses bar code scanner to indicate that equipment is installed at user site; generates an email receipt for user to acknowledge and electronically sign; email receipt is signed and sent to ITSM; the electronically signed email receipt is recorded by CMDB with appropriate location code.
8	MINREQ -012; ITAM-014	ITSM closes the work request and acknowledgement is sent to AM that installation of equipment is complete
9	MINREQ -012; DNET-003	Discovery module collects network and computing / licensing information to indicate subnet location, IP address and other pertinent information to include in the CI record and update installed application licensing information.