

Solicitation PR12040

DTS/ITSM SAAS Solution

State of Utah



State of Utah

Bid PR12040 DTS/ITSM SAAS Solution

Bid Number PR12040
Bid Title DTS/ITSM SAAS Solution

Bid Start Date In Held
Bid End Date Sep 29, 2011 11:00:00 AM MDT
Question & Answer End Date Sep 19, 2011 11:00:00 AM MDT

Bid Contact Pamela B Rugg
Purchasing Agent
State of Utah
prugg@utah.gov

Contract Duration 1 year
Contract Renewal 2 annual renewals
Prices Good for See Specifications

Bid Comments All questions must be posted in BidSync
Answers will be posted in BidSync.

Item Response Form

Item PR12040-01-01 - PR12040 DTS/ITSM SAAS Solution
Quantity 1 job
Unit Price
Delivery Location State of Utah
No Location Specified
Qty 1

Description

All questions must be posted in BidSync
Answers will be posted in BidSync.



State of Utah Request for Proposal

Legal Company Name (include d/b/a if applicable) <input type="text"/>		Federal Tax Identification Number <input type="text"/>		State of Utah Sales Tax ID Number <input type="text"/>	
Ordering Address <input type="text"/>		City <input type="text"/>		State <input type="text"/>	Zip Code <input type="text"/>
Remittance Address (if different from ordering address) <input type="text"/>		City <input type="text"/>		State <input type="text"/>	Zip Code <input type="text"/>
Type <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Government			Company Contact Person <input type="text"/>		
Telephone Number (include area code) <input type="text"/>		Fax Number (include area code) <input type="text"/>			
Company's Internet Web Address <input type="text"/>		Email Address <input type="text"/>			
Discount Terms (for bid purposes, bid discounts less than 30 days will not be considered) <input type="text"/>		Days Required for Delivery After Receipt of Order (see attached for any required minimums) <input type="text"/>			
The undersigned certifies that the goods or services offered are produced, mined, grown, manufactured, or performed in Utah. Yes <input type="checkbox"/> No <input type="checkbox"/> . If no, enter where produced, etc. <input type="text"/>					
Offeror's Authorized Representative's Signature <input type="text"/>			Date <input type="text"/>		
Type or Print Name <input type="text"/>			Position or Title <input type="text"/>		

NOTICE

When submitting a response (proposal, quote or bid) electronically through BidSync, it is the sole responsibility of the supplier to ensure that the response is received by BidSync prior to the closing date and time. Each of the following steps in BidSync MUST be completed in order to place an offer:

- A. Login to www.bidsync.com;
- B. Locate the bid (solicitation) to which you are responding;
 - a. Click the "Search" tab on the top left of the page;
 - b. Enter keyword or bid (solicitation) number and click "Search";
- C. Click on the "Bid title/description" to open the Bid (solicitation) Information Page;
- D. "View and Accept" all documents in the document section;
- E. Select "Place Offer" found at the bottom of the page;
- F. Enter your pricing, notes, other required information and upload attachments to this page;
- G. Click "Submit" at the bottom of the page;
- H. Review Offer(s); and
- I. Enter your password and click "Confirm".

Note that the final step in submitting a response involves the supplier's acknowledgement that the information and documents entered into the BidSync system are accurate and represent the supplier's actual proposal, quote or bid. This acknowledgement is registered in BidSync when the supplier clicks "Confirm". BidSync will post a notice that the offer has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted.

Be aware that entering information and uploading documents into BidSync may take considerable time. Please allow sufficient time to complete the online forms and upload documents. Suppliers should not wait until the last minute to submit a response. It is recommended that suppliers submit responses a minimum of 24 hours prior to the closing deadline. The deadline for submitting information and documents will end at the closing time indicated in the solicitation. All information and documents must be fully entered, uploaded, acknowledged (Confirm) and recorded into BidSync before the closing time or the system will stop the process and the response will be considered late and will not be accepted.

Responses submitted in BidSync are completely secure. No one (including state purchasing staff) can see responses until after the deadline. Suppliers may modify or change their response at any time prior to the closing deadline. However, all modifications or changes must be completed and acknowledged (Confirm) in the BidSync system prior to the deadline. BidSync will post a notice that the modification/change (new offer) has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted.

Utah Code 46-4-402(2) Unless otherwise agreed between a sender (supplier) and the recipient (State Purchasing), an electronic record is received when: (a) it enters an information processing system that the recipient has designated or uses for the purpose of receiving electronic records or information of the type sent and from which the recipient is able to retrieve the electronic record; and (b) it is in a form capable of being processed by that system.

REQUEST FOR PROPOSAL - INSTRUCTIONS AND GENERAL PROVISIONS

1. SUBMITTING THE PROPOSAL: (a) The Utah Division of Purchasing and General Services (DIVISION) prefers that proposals be submitted electronically. Electronic proposals may be submitted through a secure mailbox at BidSync (formerly RFP Depot, LLC) (www.bidsync.com) until the date and time as indicated in this document. It is the sole responsibility of the supplier to ensure their proposal reaches BidSync before the closing date and time. There is no cost to the supplier to submit Utah's electronic proposals via BidSync. (b) Electronic proposals may require the uploading of electronic attachments. The submission of attachments containing embedded documents is prohibited. All documents should be attached as separate files. (c) If the supplier chooses to submit the proposal directly to the DIVISION in writing: The proposal must be signed in ink, sealed, and delivered to the Division of Purchasing, 3150 State Office Building, Capitol Hill, Salt Lake City, UT 84114-1061 by the "Due Date and Time." The "Solicitation Number" and "Due Date" must appear on the outside of the envelope. All prices and notations must be in ink or typewritten. Each item must be priced separately. Unit price shall be shown and a total price shall be entered for each item offered. Errors may be crossed out and corrections printed in ink or typewritten adjacent and must be initialed in ink by person signing offer. Unit price will govern, if there is an error in the extension. Written offers will be considered only if it is submitted on the forms provided by the DIVISION. (d) Proposals, modifications, or corrections received after the closing time on the "Due Date" will be considered late and handled in accordance with the Utah Procurement Rules, section R33-3-209. (e) Facsimile transmission of proposals to DIVISION will not be considered.

2. PROPOSAL PREPARATION: (a) Delivery time of products and services is critical and must be adhered to as specified. (b) Wherever in this document an item is defined by using a trade name of a manufacturer and/or model number, it is intended that the words, "or equivalent" apply. "Or equivalent" means any other brand that is equal in use, quality, economy and performance to the brand listed as determined by the DIVISION. If the supplier lists a trade name and/or catalog number in the offer, the DIVISION will assume the item meets the specifications unless the offer clearly states it is an alternate, and describes specifically how it differs from the item specified. All offers must include complete manufacturer's descriptive literature if quoting an equivalent product. All products are to be of new, unused condition, unless otherwise requested in this solicitation. (c) Incomplete proposals may be rejected. (d) Where applicable, all proposals must include complete manufacturer's descriptive literature. (e) By submitting the proposal the offeror certifies that all of the information provided is accurate, that they are willing and able to furnish the item(s) specified, and that prices offered are correct. (f) This proposal may not be withdrawn for a period of 60 days from the due date.

3. FREIGHT COST: (a) Where "Freight Cost" is listed as a separate line item, suppliers are to provide product line item pricing FOB Origin Less Freight. On the line item for "Freight Cost" suppliers are to indicate the total freight cost FOB Destination Freight Prepaid, and complete the "Freight Information" document. The DIVISION will analyze freight charges separately from the item cost and determine how the shipment will be routed (either by the supplier, or by the State's carrier). (b) Where there is not a line item for "Freight Cost", suppliers are to provide line item pricing FOB Destination Freight Prepaid. Unless otherwise indicated on the contract/purchase order, shipping terms will be FOB Destination Freight Prepaid.

4. SOLICITATION AMENDMENTS: All changes to this solicitation will be made through written addendum only. Answers to questions submitted through BidSync shall be considered addenda to the solicitation documents. Bidders are cautioned not to consider verbal modifications.

5. PROTECTED INFORMATION: Suppliers are required to mark any specific information contained in their offer which they are claiming as protected and not to be disclosed to the public or used for purposes other than the evaluation of the offer. Each request for non-disclosure must be made by completing the "Confidentiality Claim Form" located at: <http://www.purchasing.utah.gov/contract/documents/confidentialityclaimform.doc> with a specific justification explaining why the information is to be protected. Pricing and service elements of any proposal will not be considered proprietary. All material becomes the property of the DIVISION and may be returned only at the DIVISION's option.

6. BEST AND FINAL OFFERS: Discussions may be conducted with offerors who submit proposals determined to be reasonably susceptible of being selected for award for the purpose of assuring full understanding of, and responsiveness to, solicitation requirements. Prior to award, these offerors may be asked to submit best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by a competing offeror.

7. SAMPLES: Samples of item(s) specified in this offer, brochures, etc., when required by the DIVISION, must be furnished free of expense to the DIVISION. Any item not destroyed by tests may, upon request made at the time the sample is furnished, be returned at the offeror's expense.

8. AWARD OF CONTRACT: (a) The contract will be awarded with reasonable promptness, by written notice, to the responsible offeror whose proposal is determined to be the most advantageous to the DIVISION, taking into consideration price and evaluation factors set forth in the RFP. No other factors or criteria will be used in the evaluation. The contract file shall contain the basis on which the award is made. Refer to Utah Code Annotated 65-56-408. (b) The DIVISION may accept any item or group of items, or overall best offer. The DIVISION can reject any or all proposals, and it can waive any informality, or technicality in any proposal received, if the DIVISION believes it would serve the best interests of the DIVISION. (c) Before, or after, the award of a contract the DIVISION has the right to inspect the offeror's premises and all business records to determine the offeror's ability to meet contract requirements. (d) The DIVISION will open proposals publicly, identifying only the names of the offerors. During the evaluation process, proposals will be seen only by authorized DIVISION staff and those selected by DIVISION to evaluate the proposals. Following the award decision, all proposals

become public information except for protected information (see number 5 above). A register of proposals and contract awards are posted at <http://purchasing.utah.gov/vendor/bidtab.html>. (e) Estimated quantities are for bidding purposes only, and not to be interpreted as a guarantee to purchase any amount. (f) Utah has a reciprocal preference law which will be applied against offerors offering products or services produced in states which discriminate against Utah products. For details see Section 63G-6-404 and 63G-6-405, Utah Code Annotated. (g) Multiple contracts may be awarded if the DIVISION determines it would be in its best interest.

9. DIVISION APPROVAL: Contracts written with the State of Utah, as a result of this proposal, will not be legally binding without the written approval of the Director of the DIVISION.

10. DEBARMENT: The CONTRACTOR certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the CONTRACTOR cannot certify this statement, attach a written explanation for review by the DIVISION.

11. ENERGY CONSERVATION AND RECYCLED PRODUCTS: The contractor is encouraged to offer Energy Star certified products or products that meet FEMP (Federal Energy Management Program) standards for energy consumption. The State of Utah also encourages contractors to offer products that are produced with recycled materials, where appropriate, unless otherwise requested in this solicitation.

12. GOVERNING LAWS AND REGULATIONS: All State purchases are subject to the Utah Procurement Code, Title 63 Chapter 56 U.C.A. 1953, as amended, and the Procurement Rules as adopted by the Utah State Procurement Policy Board. These are available on the Internet at www.purchasing.utah.gov. By submitting a bid or offer, the bidder/offeror warrants that the bidder/offeror and any and all supplies, services equipment, and construction purchased by the State shall comply fully with all applicable Federal and State laws and regulations, including applicable licensure and certification requirements.

13. SALES TAX ID NUMBER: Utah Code Annotated (UCA) 59-12-106 requires anyone filing a bid with the state for the sale of tangible personal property or any other taxable transaction under UCA 59-12-103(1) to include their Utah sales tax license number with their bid. For information regarding a Utah sales tax license see the Utah State Tax Commission's website at www.tax.utah.gov/sales. The Tax Commission is located at 210 North 1950 West, Salt Lake City, UT 84134, and can be reached by phone at (801) 297-2200.

(Revision Date: 13 JULY 2010 - RFP Instructions)

REQUEST FOR PROPOSAL
DTS ITSM Saas Solution
Solicitation # PR12040

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The purpose of this request for proposal is to enter into a contract with a qualified firm to deliver an ITSM (Information Technology Service Management) SASS (Software as a service) solution. It is anticipated that this RFP may result in a contract award to a single contractor.

This RFP is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

BACKGROUND

The State of Utah's Department of Technology Services (DTS) currently uses the a 3rd Party vendor to supply the following ITSM functionality:

- Incident Management
- Problem Management
- Service Level Management
- Service Request Management
- Service Catalogue Manager
- Contract Management
- Change Management
- Purchasing
- Receiving

This functionality is a partial application of a full suite of ITSM functionality available to integrate all DTS services together to take advantage of best ITIL (Information Technology Infrastructure Library) practices. ITIL is an IT management framework that provides best practices for ITSM.

The Remedy product is hosted on-premise, meaning the State of Utah owns the hardware and software that these services are delivered from. The hardware is located locally at the State of Utah's datacenter. Software patches, upgrades, customizations, and configurations are the responsibility of, and are performed by DTS employees locally.

DTS is looking to move this functionality from an on-premise to a cloud-based software-as-a-service (Saas) solution, whereby the hardware and the corresponding software is hosted at the provider's location. Patches and upgrades are performed by the provider. **In addition to the functionality listed above, DTS will implement a Saas solution for the**

following additional ITSM components which will also improve efficiencies which translate to additional cost savings:

- CMDB
- Asset Management
- Auto-Discovery

ISSUING OFFICE AND RFP REFERENCE NUMBER

The State of Utah Division of Purchasing is the issuing office for this document and all subsequent addenda relating to it, on behalf of DTS. The reference number for the transaction is Solicitation # PR12040. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

SUBMITTING YOUR PROPOSAL

Proposals must be received by the posted due date and time. Proposals received after the deadline will be late and ineligible for consideration.

The preferred method of submitting your proposal is electronically through BidSync (formerly RFP Depot.) However, if you choose to submit hard copies, one original and six (6) identical copies of your proposal must be received at the State of Utah Division of Purchasing, 3150 State Office Building, Capitol Hill, PO Box 141061, Salt Lake City, Utah 84114-1061.

When submitting a proposal electronically through BidSync, please allow sufficient time to complete the online forms and upload documents. The solicitation will end at the closing time listed in the RFP. If you are in the middle of uploading your proposal at the closing time, the system will stop the process and your proposal will not be received by the system. This RFP closes Thursday, September 29, 2011, no later than 11:00am (MDT). No bids will be accepted after the close date.

Electronic proposals may require uploading of electronic attachments. BidSync's site will accept a wide variety of document types as attachments. However, the submission of documents containing embedded documents (zip files), mov, wmp, and mp3 files are prohibited. All documents should be attached as separate files.

LENGTH OF CONTRACT

The Contract resulting from this RFP will be for a period of one year.

The contract may be extended beyond the original contract period for (indicate the number and length of extensions, i.e. year-to-year for up to two (2) additional years, at the State's discretion and by mutual agreement.

PRICE GUARANTEE PERIOD

All pricing must be guaranteed for the entire term of contract. Following the guarantee period, any request for price adjustment must be for an equal guarantee period, and must be made at least 30 days prior to the effective date. Requests for price adjustment must include sufficient documentation supporting the request. Any adjustment or amendment to the contract will not be effective unless approved by the State Director of Purchasing. The State will be given the immediate benefit of any decrease in the market, or allowable discount.

STANDARD CONTRACT TERMS AND CONDITIONS

Any contract resulting from this RFP will include, but not be limited to, the States standard terms and conditions.

QUESTIONS

All questions must be submitted through BIDSYNC (formerly RFP Depot.) Answers will be given via the BIDSYNC site. Questions must be submitted via BIDSYNC no later than 11:00 a.m. (MDT) Monday, September 19, 2011. Answers and/or clarifications regarding any inquires will be communicated via BIDSYNC. This RFP closes Thursday, September 29, 2011 no later than 11:00 a.m. (MDT).

DISCUSSIONS WITH OFFERORS (ORAL PRESENTATION)

An oral presentation by an offeror to clarify a proposal may be required at the sole discretion of the State. However, the State may award a contract based on the initial proposals received without discussion with the Offeror. If oral presentations are required, they will be scheduled after the submission of proposals. Oral presentations will be made at the offerors expense.

PROTECTED INFORMATION

The Government Records Access and Management Act (GRAMA), Utah Code Ann., Subsection 63G-2-305, provides in part that:

the following records are protected if properly classified by a government entity:

(1) trade secrets as defined in Section 13-24-2 if the person submitting the trade secret has provided the governmental entity with the information specified in Section 63G-2-309 (Business Confidentiality Claims);

(2) commercial information or non-individual financial information obtained from a person if:

(a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future;

(b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access; and

(c) the person submitting the information has provided the governmental entity with the information specified in Section 63G-2-309;

* * * * *

(6) records the disclosure of which would impair governmental procurement proceedings or give an unfair advantage to any person proposing to enter into a contract or agreement with a governmental entity, except that this Subsection (6) does not restrict the right of a person to see bids submitted to or by a governmental entity after bidding has closed;

GRAMA provides that trade secrets, commercial information or non-individual financial information may be protected by submitting a Claim of Business Confidentiality.

To protect information under a Claim of Business Confidentiality, the offeror must:

1. provide a written Claim of Business Confidentiality *at the time the information (proposal) is provided to the state*, and
2. include a concise statement of reasons supporting the claim of business confidentiality (Subsection 63G-2-309(1)).
3. submit an electronic "redacted" (excluding protected information) copy of your proposal response. Copy must clearly be marked "Redacted Version."

A Claim of Business Confidentiality may be appropriate for information such as client lists and non-public financial statements. Pricing and service elements may not be protected. An entire proposal may not be protected under a Claim of Business Confidentiality. The claim of business confidentiality must be submitted with your proposal on the form which may be accessed at:

<http://www.purchasing.utah.gov/contract/documents/confidentialityclaimform.doc>

To ensure the information is protected, the Division of Purchasing asks the offeror to clearly identify in the Executive Summary and in the body of the proposal any specific information for which an offeror claims business confidentiality protection as "PROTECTED".

All materials submitted become the property of the state of Utah. Materials may be evaluated by anyone designated by the state as part of the proposal evaluation committee. Materials submitted may be returned only at the State's option.

DETAILED SCOPE OF WORK

This RFP is issued by DTS for the purpose of soliciting fully priced proposals in connection with the provision of the Application with the following key objectives:

- § Replace the ITSM functionality of the product currently used by DTS:
- Incident Management
 - Problem Management
 - Change Management
 - Service Request Management
 - Service Catalogue Manager

- Contract Management
 - Purchasing*
 - Receiving*
- § Implement new ITSM functionality:
- CMDB
 - IT Asset Management
 - Auto-Discovery**

*For the purpose of the RFP response, Purchasing and Receiving functionality are included in the scope of Asset Management within the ISTM Saas RFP Questionnaire.

**For the purpose of the RFP response, Auto-Discovery requirements are included within the scope of Asset Management and CMDB within the ISTM Saas RFP Questionnaire.

- § Deploy integrated knowledge management system
- § Ensure integration to existing system management and discovery tools. For example, the tool must be able to integrate with, and incorporate asset data gathered by Zenworks, which is being utilized to manage desktop discovery and patch management.

The successful Application will be aligned to the key business goals of reducing risk, improving efficiency and minimizing client impact.

The selected tool is required to support the eleven processes listed above (Incident, Problem, Change, Purchasing, Receiving, Service Request, Service Level Management, Contract Management, CMDB, IT Asset Management, and Auto-Discovery). The application also needs to be built to provide the ability to customize existing UI layout, business rules and behaviors. The ideal Application will include utilities and/or functionality which will enable DTS to build custom applications to support new business requirements as needed. Utilities and functionality should allow development of custom applications without having to use proprietary development tools provided by the vendor.

- § DTS has a strong preference towards a single vendor providing software licenses and professional services as an end-to-end solution.
- § DTS aims to procure a fully implemented solution i.e. including (but not necessarily limited to) software licenses and professional services for design, build, test, deploy and support. Its procurement objective is to select a vendor able to provide this enabling technology together with the necessary supporting services. Implementation should consist of a phased deployment schedule recommended by vendor in accordance to DTS specified short-term and long-term goals.
- § DTS expects application to provide Net-native Web 2.x and/or Web 3.x interface and supporting utilities. Remote access by IT staff required, including a mobile client to run on smart phones, IPAD, I-phone etc., for use by roaming IT staff, for incident, problem IT asset and change management processes.

- § DTS requires multiple instances of the solution in order to provide environments for development, test, user acceptance testing (UAT) and production, to ensure testing consistency and to reduce upgrade risk.
- § DTS requires the tool to be able to provide full reporting capabilities of metrics relating to Service Level Agreements. These metrics include, but are not limited to :
 - Time to initial response for all incidents and requests
 - Total time to resolution for all incidents and requests
 - First call resolution
- § DTS requires the tool to be able to auto generate customer satisfaction surveys at varying intervals so as to not inundate the customer with surveys.

This initiative is expected to bring significant cost savings and performance benefits for DTS. Additionally the initiative will provide additional qualitative benefits including fewer incidents, reduction in application downtime, improved metrics and reporting, and quicker time to implementation of customizations of the product.

Core Functionality

The selected tool should be preconfigured to support best practice IT service management processes. DTS has chosen best practice framework is based on ITIL. Bidders should clearly state how their product supports ITIL best practice and other best practice methodologies and should provide evidence of independent verification of their tools.

The processes to be supported initially include:

- § Incident management
- § Problem management
- § Change Management
- § Contract Management
- § Service Level Management
- § Purchasing
- § Receiving
- § Configuration management (CMDB)
- § Service Request (including Service Catalog)
- § Discovery
- § IT Asset Management

The proposal is required to support these nine key processes. Although some ITIL processes are currently not in scope for the program, Bidders should be clear where their application would enable early implementation of these processes with minimal risk to DTS.

Bidders should indicate where their product may not be compliant in this respect and should provide an indication of their future development plans in respect of extending or enhancing their capability.

The Application should be scalable to support the estimated user profile set out below

without significant re-configuration.

Process based on Function	Concurrent Users
Incident Management	150
Problem Management	150
Service Request (including Service Catalog)	150
Change Management	25
Knowledge Management	200
Configuration Management (CMDB)	75
IT Asset Management	150
Self-service Access for End Users	300
Reporting	300
Managed Servers for Discovery and App Mapping	3000
Contract Management	150
Service Level Management	150

The selected application will be considered the master data source for DTS's IT Service Management capability and must:

- § Offer synchronization of at least all data items required to support ITIL best practices
- § Provide out-of-the-box capability to report against ITIL standard service performance metrics with the flexibility to report against custom KPIs. This would also include management reporting capabilities.
- § Interface to DTS's tools/systems such as:
 - CWO
 - Aries
 - TUAM
 - eDirectory
 - Other 3rd Party Discovery Tools.

Additionally:

- § Support bi-directional interfaces with other tools/systems. The application must support origination and routing of incidents, problems and known-errors to resolving teams from internal and external parties. The application must also allow relationships to be created and maintained between the key data items. For example, incidents, problems, known-errors and changes.
- § Configurable business rule capability should be supported
- § Graphical Workflow capability should be supported
- § Occasional users (employee self-help or service catalog browsing) should be supported with no additional license requirements.

Non-functional Capability

- § Interfaces, including those with external service provider systems and application systems must support guaranteed transaction delivery (e.g. in the event of system or communications failure). They must also manage the integrity of data sufficiently e.g. by resolving conflicts during recovery or where interfaces do not operate in real time.
- § High availability application including support for resilient infrastructure
- § Minimal downtime required to support 24x7 working globally. Availability must be at 99.95% or higher. This uptime availability must be generally available to other customers currently using the vendors' offering.
- § Centrally managed application that is accessible regionally
- § Centrally managed application that supports regional, local and functional configurations
- § Development, Test, Staging, Production, Disaster Recovery and Training environments hosted on a minimum of three instances
- § Browser-based user interface and administration across the Internet.
- § Application performance must not constrain usability for global application users or our service providers.
- § Modern Web 2.x or 3.x appearance, usability, and functionality for both users and developers
- § Development must be possible using non-proprietary development tools (e.g. industry standard technologies such as SOAP or WSDL, Web Services, JDBC, LDAP)

Services required from Supplier

DTS wishes to procure the following professional services for the configuration, deployment, support and maintenance of the integrated ITIL compatible service management tool:

- § Application architecture & design (hardware and software)
- § Pragmatic subject matter implementation expert (process and data)
- § Application and interface configuration
- § Application testing and deployment
- § Support & maintenance
- § Upgrade assurance
- § Application Training (technical administration)
- § Application Training
- § Application customization

PROPOSAL REQUIREMENTS AND COMPANY QUALIFICATIONS

Minimum Requirements

- Vendor must have at a minimum of 4 years of experience delivering native ITSM SaaS technology.
- The solution must be delivered and developed using net-native, Web 2.x and 3.x

- technology.
- DTS must have direct control of application changes and customizations.
 - All customizations made by DTS must be preserved through standard upgrades, meaning that any standard upgrade made by the vendor will not impact any customization made by DTS and will not require any modifications to the customizations in order for the upgrade to be implemented and function as designed.
 - Solution must have a simplified, predictable subscription license.
 - Vendor must provide 3 references that include customers using full range of ITSM functionality in a SaaS environment as defined under the Core Functionality section above. The references must be of the same size and scope of this project.
 - Solution must deliver quick and flexible implementations.
 - Solution must deliver frequent, vendor-managed, automatic non-disruptive upgrades.
 - Solution must provide for access to data via web-services or some open standard so as to allow push/pull access to/from data maintained by solution.

Proof of Concept

DTS requires a proof of concept (POC) not to exceed thirty days. The POC must include the implementation or testing environment of base-level functionality (out-of-box). POCs can occur concurrently. DTS requires a POC of at least, but necessarily all of the following functional areas:

- § Incident management
- § Problem management
- § Change Management
- § Contract Management
- § Service Level Management
- § Purchasing
- § Receiving
- § Configuration management (CMDB)
- § Service Request (including Service Catalog)
- § Discovery
- § IT Asset Management

Vendor must demonstrate POC functionality in a manner that simulates expected implementation of production system. Any POC must not take longer than 4 hours to set up and make useable to DTS employees. DTS's objective is to identify potential strengths and weaknesses associated with deployment of a vendor's proposed solution, and the vendor's ability to react to service requests occurring in a dynamic development environment. This feedback will be used as a means to determine feasible implementation schedules.

Demonstration of the ability to offer agile and dynamic customization ability with non-

proprietary application development facilities/tools will be viewed as positive.

Any proposals from companies unable to meet the above schedule or the Proof of Concept requirements will be rejected.

PROPOSAL RESPONSE FORMAT

All proposals must include:

1. **RFP Form.** The State's Request for Proposal form completed and signed.
2. **Executive Summary.** The one or two page executive summary is to briefly describe the offeror's proposal. This summary should highlight the major features of the proposal. It must indicate any requirements that cannot be met by the offeror. The reader should be able to determine the essence of the proposal by reading the executive summary. Protected information requests should be identified in this section.
3. **Detailed Response.** This section should constitute the major portion of the proposal and must contain at least the following information:
 - A. A complete narrative of the offeror's assessment of the work to be performed, the offerors ability and approach, and the resources necessary to fulfill the requirements. This should demonstrate the offeror's understanding of the desired overall performance expectations. Clearly indicate any options or alternatives proposed.
 - B. A specific point-by-point response, in the order listed, to each requirement in the RFP.
4. **Cost Proposal.** Cost will be evaluated independently from the technical proposal. Please enumerate all costs on the attached Cost Proposal Form.

PROPOSAL EVALUATION CRITERIA

A committee will evaluate proposals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail in the proposal.

<u>WEIGHT</u>	<u>EVALUATION CRITERIA</u>
30 %	Cost
25 %	Demonstrated capabilities based on the descriptive guidance responses in the "Vendor & Product Info", "Pricing & Services" and "Technical Foundation" sections of the Questionnaire.
15 %	Demonstrated functional capability based on the self-scoring in the "Functional Foundation", "Incident", "Problem", "Knowledge Management", "Change", "Self-Service", "Asset Management", "CMDB", and "SRM" sections

of the Questionnaire

15 % Qualification and expertise of staff proposed for this project.

15 % Performance references for similar projects.

Business & Technical Requirements/Functionality

See attached ITSM Saas RFP Questionnaire

RFP Evaluation Score Sheet

See attached ITSM Saas RFP Questionnaire

ATTACHMENT A: STATE OF UTAH STANDARD TERMS AND CONDITIONS

1. **AUTHORITY:** Provisions of this contract are pursuant to the authority set forth in 63G-6, Utah Code Annotated, 1953, as amended, Utah State Procurement Rules (Utah Administrative Code Section R33), and related statutes which permit the State to purchase certain specified services, and other approved purchases for the State.
2. **CONTRACT JURISDICTION, CHOICE OF LAW, AND VENUE:** The provisions of this contract shall be governed by the laws of the State of Utah. The parties will submit to the jurisdiction of the courts of the State of Utah for any dispute arising out of this Contract or the breach thereof. Venue shall be in Salt Lake City, in the Third Judicial District Court for Salt Lake County.
3. **LAWS AND REGULATIONS:** The Contractor and any and all supplies, services, equipment, and construction furnished under this contract will comply fully with all applicable Federal and State laws and regulations, including applicable licensure and certification requirements.
4. **RECORDS ADMINISTRATION:** The Contractor shall maintain, or supervise the maintenance of all records necessary to properly account for the payments made to the Contractor for costs authorized by this contract. These records shall be retained by the Contractor for at least four years after the contract terminates, or until all audits initiated within the four years, have been completed, whichever is later. The Contractor agrees to allow State and Federal auditors, and State Agency Staff, access to all the records to this contract, for audit and inspection, and monitoring of services. Such access will be during normal business hours, or by appointment.
5. **CERTIFY REGISTRATION AND USE OF EMPLOYMENT "STATUS VERIFICATION SYSTEM":** The Status Verification System, also referred to as "E-verify", only applies to contracts issued through a Request for Proposal process, and to sole sources that are included within a Request for Proposal. It does not apply to Invitation for Bids or to the Multi-Step Process.

5.1 Status Verification System

1. Each offeror and each person signing on behalf of any offeror certifies as to its own entity, under penalty of perjury, that the named Contractor has registered and is participating in the Status Verification System to verify the work eligibility status of the contractor's new employees that are employed in the State of Utah in accordance with applicable immigration laws including UCA Section 63G-12-302.
2. The Contractor shall require that the following provision be placed in each subcontract at every tier: "The subcontractor shall certify to the main (prime or general) contractor by affidavit that the subcontractor has verified through the Status Verification System the employment status of each new employee of the respective subcontractor, all in accordance with applicable immigration laws including UCA Section 63G-12-302 and to comply with all applicable employee status verification laws. Such affidavit must be provided prior to the notice to proceed for the subcontractor to perform the work."
3. The State will not consider a proposal for award, nor will it make any award where there has not been compliance with this Section.
4. Manually or electronically signing the Proposal is deemed the Contractor's certification of compliance with all provisions of this employment status verification certification required by all applicable status verification laws including UCA Section 63G-12-302.

5.2 Indemnity Clause for Status Verification System

1. Contractor (includes, but is not limited to any Contractor, Design Professional, Designer or Consultant) shall protect, indemnify and hold harmless, the State and its officers, employees, agents, representatives and anyone that the State may be liable for, against any claim, damages or liability arising out of or resulting from violations of the above Status Verification System Section whether violated by employees, agents, or contractors of the following: (a) Contractor; (b) Subcontractor at any tier; and/or (c) any entity or person for whom the Contractor or Subcontractor may be liable.
2. Notwithstanding Section 1. above, Design Professionals or Designers under direct contract with the State shall only be required to indemnify the State for a liability claim that arises out of the design professional's services, unless the liability claim arises from the Design Professional's negligent act, wrongful act, error or omission, or other liability imposed by law except that the design professional shall be required to indemnify the State in regard to subcontractors or subconsultants at any tier that are under the direct or indirect control or responsibility of the Design Professional, and includes all independent contractors, agents, employees or anyone else for whom the Design Professional may be liable at any tier.
6. **CONFLICT OF INTEREST:** Contractor represents that none of its officers or employees are officers or employees of the State of Utah, unless disclosure has been made in accordance with 67-16-8, Utah Code Annotated, 1953, as amended.
7. **CONTRACTOR, AN INDEPENDENT CONTRACTOR:** The Contractor shall be an independent contractor, and as such, shall have no authorization, express or implied, to bind the State to any agreements, settlements, liability, or understanding whatsoever, and agrees not to perform any acts as agent for the State, except as herein expressly set forth. Compensation stated herein shall be the total amount payable to the Contractor by the State. The Contractor shall be responsible for the payment of all income tax and social security amounts due as a result of payments received from the State for these contract services. Persons employed by the State and acting under the direction of the State shall not be deemed to be employees or agents of the Contractor.
8. **INDEMNITY CLAUSE:** The Contractor agrees to indemnify, save harmless, and release the State of Utah, and all its officers, agents, volunteers, and employees from and against any and all loss, damages, injury, liability, suits, and proceedings arising out of the performance of this contract which are caused in whole or in part by the acts or negligence of the Contractor's officers, agents, volunteers, or employees, but not for claims arising from the State's sole negligence. The parties agree that if there are any Limitations of the Contractor's Liability, including a limitation of liability for anyone for whom the Contractor is responsible, such Limitations of Liability will not apply to injuries to persons, including death, or to damages to property.
9. **EMPLOYMENT PRACTICES CLAUSE:** The Contractor agrees to abide by the provisions of Title VI and VII of the Civil Rights Act of 1964 (42USC 2000e) which prohibits discrimination against any employee or applicant for employment or any applicant or recipient of services, on the basis of race, religion, color, or national origin; and further agrees to abide by Executive Order No.

- 11246, as amended, which prohibits discrimination on the basis of sex; 45 CFR 90 which prohibits discrimination on the basis of age; and Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act of 1990 which prohibits discrimination on the basis of disabilities. Also, the Contractor agrees to abide by Utah's Executive Order, dated March 17, 1993, which prohibits sexual harassment in the work place.
10. **SEPARABILITY CLAUSE:** A declaration by any court, or any other binding legal source, that any provision of this contract is illegal and void shall not affect the legality and enforceability of any other provision of this contract, unless the provisions are mutually dependent.
 11. **RENEGOTIATION OR MODIFICATIONS:** This contract may be amended, modified, or supplemented only by written amendment to the contract, executed by authorized persons of the parties hereto, and attached to the original signed copy of the contract. Automatic renewals will not apply to this contract.
 12. **DEBARMENT:** The Contractor certifies that neither it nor its principals are presently or have ever been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract), by any governmental department or agency. If the Contractor cannot certify this statement, attach a written explanation for review by the State. The Contractor must notify the State Director of Purchasing within 30 days if debarred by any governmental entity during the Contract period.
 13. **TERMINATION:** Unless otherwise stated in the Special Terms and Conditions, this contract may be terminated, with cause by either party, in advance of the specified termination date, upon written notice being given by the other party. The party in violation will be given ten (10) working days after notification to correct and cease the violations, after which the contract may be terminated for cause. This contract may be terminated without cause, in advance of the specified expiration date, by either party, upon sixty (60) days prior written notice being given the other party. On termination of this contract, all accounts and payments will be processed according to the financial arrangements set forth herein for approved services rendered to date of termination.
 14. **NONAPPROPRIATION OF FUNDS:** The Contractor acknowledges that the State cannot contract for the payment of funds not yet appropriated by the Utah State Legislature. If funding to the State is reduced due to an order by the Legislature or the Governor, or is required by State law, or if federal funding (when applicable) is not provided, the State may terminate this contract or proportionately reduce the services and purchase obligations and the amount due from the State upon 30 days written notice. In the case that funds are not appropriated or are reduced, the State will reimburse Contractor for products delivered or services performed through the date of cancellation or reduction, and the State will not be liable for any future commitments, penalties, or liquidated damages.
 15. **SALES TAX EXEMPTION:** The State of Utah's sales and use tax exemption number is 11736850-010-STC, located at <http://purchasing.utah.gov/contract/documents/salestaxexemptionformsinged.pdf>. The tangible personal property or services being purchased are being paid from State funds and used in the exercise of that entity's essential functions. If the items being purchased are construction materials, they will be converted into real property by employees of this government entity, unless otherwise stated in the contract.
 16. **WARRANTY:** The Contractor agrees to warrant and assume responsibility for all products (including hardware, firmware, and/or software products) that it licenses, contracts, or sells to the State of Utah under this contract for a period of one year, unless otherwise specified and mutually agreed upon elsewhere in this contract. The Contractor (seller) acknowledges that all warranties granted to the buyer by the Uniform Commercial Code of the State of Utah apply to this contract. Product liability disclaimers and/or warranty disclaimers from the seller are not applicable to this contract unless otherwise specified and mutually agreed upon elsewhere in this contract. In general, the Contractor warrants that: (1) the product will do what the salesperson said it would do, (2) the product will live up to all specific claims that the manufacturer makes in their advertisements, (3) the product will be suitable for the ordinary purposes for which such product is used, (4) the product will be suitable for any special purposes that the State has relied on the Contractor's skill or judgment to consider when it advised the State about the product, (5) the product has been properly designed and manufactured, and (6) the product is free of significant defects or unusual problems about which the State has not been warned. Remedies available to the State include the following: The Contractor will repair or replace (at no charge to the State) the product whose nonperformance is discovered and made known to the Contractor in writing. If the repaired and/or replaced product proves to be inadequate, or fails of its essential purpose, the Contractor will refund the full amount of any payments that have been made. Nothing in this warranty will be construed to limit any rights or remedies the State of Utah may otherwise have under this contract.
 17. **PUBLIC INFORMATION:** Contractor agrees that the contract, related Sales Orders, and Invoices will be public documents, and may be available for distribution. Contractor gives the State express permission to make copies of the contract, related Sales Orders, and Invoices in accordance with the State of Utah Government Records Access and Management Act (GRAMA). Except for sections identified in writing and expressly approved by the State Division of Purchasing, Contractor also agrees that the Contractor's response to the solicitation will be a public document, and copies may be given to the public under GRAMA laws. The permission to make copies as noted will take precedence over any statements of confidentiality, proprietary information, copyright information, or similar notation.
 18. **DELIVERY:** Unless otherwise specified in this contract, all deliveries will be F.O.B. destination with all transportation and handling charges paid by the Contractor. Responsibility and liability for loss or damage will remain with Contractor until final inspection and acceptance when responsibility will pass to the State except as to latent defects, fraud and Contractor's warranty obligations.
 19. **ORDERING AND INVOICING:** All orders will be shipped promptly in accordance with the delivery schedule. The Contractor will promptly submit invoices (within 30 days of shipment or delivery of services) to the State. The State contract number and/or the agency purchase order number shall be listed on all invoices, freight tickets, and correspondence relating to the contract order. The prices paid by the State will be those prices listed in the contract. The State has the right to adjust or return any invoice reflecting incorrect pricing.

20. **PROMPT PAYMENT DISCOUNT:** Offeror may quote a prompt payment discount based upon early payment; however, discounts offered for less than 30 days will not be considered in making the award. Contractor shall list Payment Discount Terms on invoices. The prompt payment discount will apply to payments made with purchasing cards and checks. The date from which discount time is calculated will be the date a correct invoice is received or receipt of shipment, whichever is later; except that if testing is performed, the date will be the date of acceptance of the merchandise.
21. **PAYMENT:** Payments are normally made within 30 days following the date the order is delivered or the date a correct invoice is received, whichever is later. After 60 days from the date a correct invoice is received by the appropriate State official, the Contractor may assess interest on overdue, undisputed account charges up to a maximum of the interest rate paid by the IRS on taxpayer refund claims, plus two percent, computed similarly as the requirements of Utah Code Annotated Section 15-6-3. The IRS rate is adjusted quarterly, and is applied on a per annual basis, on the invoice amount that is overdue. All payments to the Contractor will be remitted by mail, electronic funds transfer, or the State of Utah's Purchasing Card (major credit card).
22. **PATENTS, COPYRIGHTS, ETC.:** The Contractor will release, indemnify and hold the State, its officers, agents and employees harmless from liability of any kind or nature, including the Contractor's use of any copyrighted or un-copyrighted composition, secret process, patented or un-patented invention, article or appliance furnished or used in the performance of this contract.
23. **ASSIGNMENT/SUBCONTRACT:** Contractor will not assign, sell, transfer, subcontract or sublet rights, or delegate responsibilities under this contract, in whole or in part, without the prior written approval of the State.
24. **DEFAULT AND REMEDIES:** Any of the following events will constitute cause for the State to declare Contractor in default of the contract: 1. Nonperformance of contractual requirements; 2. A material breach of any term or condition of this contract. The State will issue a written notice of default providing a ten (10) day period in which Contractor will have an opportunity to cure. Time allowed for cure will not diminish or eliminate Contractor's liability for damages. If the default remains, after Contractor has been provided the opportunity to cure, the State may do one or more of the following: 1. Exercise any remedy provided by law; 2. Terminate this contract and any related contracts or portions thereof; 3. Impose liquidated damages, if liquidated damages are listed in the contract; 4. Suspend Contractor from receiving future solicitations.
25. **FORCE MAJEURE:** Neither party to this contract will be held responsible for delay or default caused by fire, riot, acts of God and/or war which is beyond that party's reasonable control. The State may terminate this contract after determining such delay or default will reasonably prevent successful performance of the contract.
26. **PROCUREMENT ETHICS:** The Contractor understands that a person who is interested in any way in the sale of any supplies, services, construction, or insurance to the State of Utah is violating the law if the person gives or offers to give any compensation, gratuity, contribution, loan or reward, or any promise thereof to any person acting as a procurement officer on behalf of the State, or who in any official capacity participates in the procurement of such supplies, services, construction, or insurance, whether it is given for their own use or for the use or benefit of any other person or organization (63G-6-1002, Utah Code Annotated, 1953, as amended).
27. **CONFLICT OF TERMS:** Contractor Terms and Conditions that apply must be in writing and attached to the contract. No other Terms and Conditions will apply to this contract including terms listed or referenced on a Contractor's website, terms listed in a Contractor quotation/sales order, etc. In the event of any conflict in the contract terms and conditions, the order of precedence shall be: 1. Attachment A: State of Utah Standard Terms and Conditions; 2. State of Utah Contract Signature Page(s); 3. State Additional Terms and Conditions; 4. Contractor Terms and Conditions.
28. **ENTIRE AGREEMENT:** This Agreement, including all Attachments, and documents incorporated hereunder, and the related State Solicitation constitutes the entire agreement between the parties with respect to the subject matter, and supersedes any and all other prior and contemporaneous agreements and understandings between the parties, whether oral or written. The terms of this Agreement shall supersede any additional or conflicting terms or provisions that may be set forth or printed on the Contractor's work plans, cost estimate forms, receiving tickets, invoices, or any other related standard forms or documents of the Contractor that may subsequently be used to implement, record, or invoice services hereunder from time to time, even if such standard forms or documents have been signed or initialed by a representative of the State. The parties agree that the terms of this Agreement shall prevail in any dispute between the terms of this Agreement and the terms printed on any such standard forms or documents, and such standard forms or documents shall not be considered written amendments of this Agreement.

(Revision date: 12 July 2011)

ATTACHMENT C**UTAH DEPARTMENT OF TECHNOLOGY SERVICES (DTS)****AND INFORMATION SECURITY****DEPARTMENT STANDARD TERMS AND CONDITIONS**

1. **NOTICE:** Wherever under this contract one party is required to give formal notice to the other, such notice shall be deemed given upon delivery, if delivered by hand (in which case a signed receipt shall be obtained), or three days after date sent if sent by registered or certified mail, return receipt requested. Formal Notices to the Contractor and to the State shall be addressed as follows:

Contractor:	State of Utah:
Contact Person and Contractor Address as Indicated on Signed State of Utah	Contracts Manager Department of Technology Services
Contract (Cover) Page of this Contract	1 State Office Building, 6 th Floor Salt Lake City, Utah 84114

2. **WAIVER:** The waiver by either party of any provision, term, covenant or condition of this Contract shall not be deemed to be a waiver of any other provision, term, covenant or condition of this Contract nor any subsequent breach of the same or any other provision, term, covenant or condition of this Contract.

3. **REDUCTION OF FUNDS:** (N/A to Open-Ended Contracts): The maximum amount authorized by this contract shall be reduced or contract terminated if required by Federal/State law, regulation, or action or there is significant under utilization of funds, provided the Contractor shall be reimbursed for all services performed in accordance with this contract prior to date of reduction or termination. If funds are reduced, there will be a comparable reduction in amount of services to be given by the Contractor. The Department will give the Contractor thirty (30) days notice of reduction.

4. **SUSPENSION OF WORK:** Should circumstances arise which would cause the State the need to suspend the work, but not terminate the contract, this will be done by written NOTICE, which meets the NOTICE requirements of this contract. The work may be reinstated upon advance written NOTICE from the State, to recommence as mutually agreed between the parties. The State understands any such suspension of the work may affect both the time of performance and price to complete the work when reinstated.

5. **WORKERS' COMPENSATION:** The Contractor shall take out, furnish proof, and maintain during the life of this contract workers' compensation insurance for all its employees employed at the site of the project in Utah, and in the event any work is subcontracted, the Contractor agrees to require any of its Subcontractors to similarly provide and furnish proof of workers' compensation insurance for all the latter's employees employed on any site of the project in Utah.

6. **CONFLICT OF INTEREST WITH STATE EMPLOYEES:** In addition to the provisions of State T&C Clause 5, the Contractor certifies, through the execution of the contract, that no person in the State's employment, directly or through subcontract, will receive any private financial interest, direct or indirect, in the contract. The CONTRACTOR will not hire or subcontract with any person having such conflicting interest.

7. **THIRD PARTY CLAIMS INDEMNIFICATION:** Contractor agrees to indemnify the State against third party claims for infringement for materials created and furnished by Contractor, for claims for death, bodily injury, or tangible property damage.

8. **INVOICES:** Each invoice must contain a unique invoice number and a customer account number, detail of work completed (e.g. time x rate) on the contract. The State reserves the right to correct invoices not in accordance with this Contract.

9. **PAYMENT BY THE STATE / INTEREST ON LATE PAYMENTS:** Payments to the Contractor shall generally be made within thirty (30) days of receipt by the State of an accurate invoice and receipt in Finance of the responsible State Project Manager's certification of acceptable completion of work, presuming receipt by the State of a correct, detailed invoice from the Contractor. Utah's Prompt Payment Act, UCA §15-6-2 requires payment within 60 days after receipt of the invoice covering the delivered items or services. If the State's payment is more than 60 days late, interest shall accrue and be charged on payments overdue starting on the 61st day that the State's payment may be overdue, until paid, unless this is a disputed payment. UCA §15-6-3 allows late payment interest at 2% above the rate paid by the IRS on refund claims.

The State's payment of invoices shall be sent via mail, or may be paid electronically at the discretion of the State.

10. **EMPLOYMENT PRACTICES OF CONTRACTOR:** In addition to Employment Practices Clause requirements stated in State T&C Clause 8, the following equal opportunity provisions apply to this contract. The Contractor agrees to abide by the provisions of:

Section 188 of the Workforce Investment Act of 1998 (WIA) (29 USC 2938), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against discrimination to beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I-financially assisted program or activity; and

Title IX of the Education Amendments of 1972 (20 USC 1681 et seq.), as amended, which prohibits discrimination on the basis of sex in education programs.

11. **COPYRIGHT:** The contractor agrees that any and all Deliverables prepared for the Department, to the extent to which it is eligible under copyright law in any country, shall be deemed a work made for hire, such that all rights, title and interest in the work and Deliverables reside with the Department. The Department reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use and to authorize others to use for Federal or State Government purposes, such software, modifications and documentation. To the extent any work or Deliverable is deemed not to be, for any reason whatsoever, work made for hire, Contractor agrees to assign and hereby assigns all right title and interest, including but not limited to copyright patent, trademark and trade secret, to such work and Deliverables, and all extensions and renewals thereof, to Department. Contractor further agrees to provide all assistance reasonably requested by Department in the establishment, preservation, and enforcement of its rights in such work and Deliverables, without any additional compensation to Contractor. Contractor agrees to and hereby, to the extent permissible, waives all legal and equitable rights relating to the work and Deliverables, including without limitation any and all rights of identification of authorship and any and all rights of approval, restriction or limitation on use or subsequent modifications.

12. **LIABILITY INSURANCE:** The Contractor agrees to provide and to maintain during the performance of the contract, at its sole expense, a policy of liability insurance. The limits of the policy shall be no less than \$500,000.00 for each occurrence and \$1,000,000.00 aggregate. The Contractor further agrees to provide the Contracts Manager for the Department of Technology Services with proof of adequate insurance coverage, in accordance with the NOTICE provisions of this contract.

It shall be the responsibility of the Contractor to require any of their Subcontractor(s) to secure the same insurance coverage as prescribed herein for the Contractor. Evidence of the subcontractor's insurance coverage shall also be provided to the Contracts Manager for the Department of Technology Services, also in compliance with the NOTICE provisions of this contract.

13. CITING DEPARTMENT IN ADVERTISING / PUBLICITY: The Contractor agrees to give credit to the Department of Technology Services (DTS) and the Utah Department of Workforce Services for funding in all written and verbal advertising or discussion of this program such as brochures, flyers, informational materials, talk shows, etc. All formal advertising or public information programs will be coordinated with the DTS Public Information Officer. Any publicity given to the project or services provided herein shall identify the Department of Technology Services as sponsoring agency and shall not be released without prior written approval by the DTS Project Manager.

14. STATE AGENCY WEB SITE BRANDING: The Contractor agrees to allow the Department of Technology Services to utilize its DTS logo, or a newer version if replaced in the future, on websites produced under terms of this contract. Contractor further agrees to allow state agencies that DTS is ultimately providing consulting services for, such as DEPARTMENT, Workforce Services, Tax Commission, etc. to also utilize their own Department web site branding and logo, if requested by that state agency.

15. DRUG-FREE WORKPLACE: The Contractor understands that the Department provides a drug-free workplace in accordance with all federal and state laws and regulations. The Contractor agrees to abide by the Department's drug-free workplace policies while on State of Utah premises and the Department of Technology Services will provide the Contractor with a copy of these written "drug-free workplace policies".

16. OVERPAYMENT / UNDERPAYMENT AUDIT EXCEPTIONS / ADJUSTMENTS / DISALLOWANCES: The Contractor agrees that if during or subsequent to the contract performance, a CPA audit, or a State agency audit determines that payments were incorrectly reported or paid, the Department may adjust the payments. In contracts, which include a cost reimbursement budget, Contractor expenditures to be eligible for reimbursement must be adequately documented. The Contractor will, upon written request, immediately refund any overpayments determined by audit and for which payment has been made to the contractor, to the Department. The Contractor further agrees that the Department shall have the right to withhold any or all-subsequent payments under this or other contracts that the Contractor may have with the State until recoupment of overpayment is made. The Department agrees to promptly notify the Contractor in the event any underpayments on this contract are discovered.

17. OWNERSHIP, PROTECTION, AND USE OF STATE OF UTAH, STATE OF UTAH CLIENT, OR STATE OF UTAH EMPLOYEE RECORDS: Except for confidential medical records held by direct care providers, the State shall own exclusive title to all information gathered, reports developed, and conclusions reached in performance of this Contract. The Contractor may not use, except in meeting its obligations under this contract, information gathered, reports developed, or conclusions reached in performance of this Contract without the express written consent of the State. The improper use or disclosure by any party of any information concerning a State of Utah client, or a State of Utah employee for any purpose not directly connected with the administration of the Department, or the Contractor's responsibilities with respect to services purchased under this agreement, is prohibited except on written consent of the state agency employee, state agency client, their attorney, or their responsible parent or guardian. The Contractor will be required to sign a Confidential Information Certification form in situations where they will be given access to confidential computerized records. The Contractor agrees to maintain the confidentiality of records it holds as agent for the State as required by GRAMA, or other applicable federal or state law. The State of Utah shall own and retain unlimited rights to use, disclose, or duplicate all information and data (copyrighted or otherwise) developed, derived, documented, stored, or furnished by the Contractor under the Contract. The Contractor, and any subcontractors under its control, expressly agrees not to use confidential client, or confidential federal, state, or local government data furnished for purposes of contract

performance, without prior written permission from the Project Manager for the Department of Technology Services, and appropriate officials of the State Agency.

18. OWNERSHIP, PROTECTION, AND USE OF CONFIDENTIAL FEDERAL, STATE, OR LOCAL GOVERNMENT INTERNAL BUSINESS PROCESSES AND PROCEDURES: The improper use or disclosure by any party of protected internal Federal or State business processes, policies, procedures, or practices is prohibited. Confidential federal or state business processes, policies, procedures, or practices shall not be divulged by the Contractor, Contractor's employees, or their Subcontractors, unless prior written consent has been obtained in advance from the Project Manager for the Department of Technology Services.

19. OWNERSHIP, PROTECTION, AND RETURN OF DOCUMENTS AND DATA UPON CONTRACT TERMINATION OR COMPLETION: All documents and data pertaining to work required by this contract will be the property of the STATE and must be delivered to the STATE within 10 working days after termination or completion of the contract, regardless of the reason for contract termination, and without restriction or limitation to their future use. Any State data that may be returned under provisions of this clause must either be in the format as originally provided, or in a format that is readily usable by the State or that can be formatted in a way that it can be used. Costs for all of these described items will be considered as included in the basic contract compensation of the work described.

20. CODE OF CONDUCT: The Contractor agrees to follow and enforce the Department of Technology Services Code of Conduct. If Contractor is working at facilities controlled by other State agencies, Contractor agrees to follow and enforce the Code of Conduct of these other State Agencies when Contractor is providing services at these facilities under provisions of this contract. The Contractor will assure that each employee or volunteer under Contractor's supervision receives a copy of such Code of Conduct, and a signed statement to this effect must be in each Contractor or Subcontractor employee's/volunteer's file and is subject to inspection and review by the Department monitors. Department of Technology Services agrees to provide Contractor with a copy of any applicable codes of conduct. If a Contractor or Subcontractor is working at any state agency which has a Code of Conduct applicable to this Contract, the Department of Technology Services Project Manager will provide Contractor with a copy in advance of Contractor's on-site contract services performance.

21. TERMINATION UPON DEFAULT: In the event this contract is terminated as a result of a default by the Contractor, the Department may procure or otherwise obtain, upon such terms and conditions as the Department deems appropriate, services similar to those terminated, and Contractor shall be liable to the Department for any and all damages arising there from, including, but not limited to, attorneys' fees and excess costs incurred by the Department in obtaining similar services..

22. CONTRACTOR'S RESPONSIBILITIES / QUALITY OF WORK: The Department will enter into contractual agreement with the Contractor only. The Contractor shall be responsible for all services as required by the RFP/bid. Contractor warrants that all services shall be performed in a professional and workmanlike manner consistent with best industry practice and in accordance with the Statement of Work.

23. PAYMENT WITHHOLDING: The Contractor agrees that the adequate reporting, record keeping, and compliance requirements specified in this contract are a material element of performance and that if, in the opinion of the Department, the Contractor's record keeping practices, compliance, and/or reporting to the Department are not conducted in a timely and satisfactory manner, the Department may withhold part or all payments under this or any other contract until such deficiencies have been remedied. This includes, but is not limited to, Contractors failure to timely provide to the Department of Technology Services Contracts Manager the Contractor's proof of adequate insurance coverage, or Contractor's failure to provide timely invoicing, and/or other requirements described elsewhere within this contract. In the event of the payment(s) being withheld, the Department agrees to provide ten (10) day advance NOTICE to the Contractor of the deficiencies that must be corrected in order to bring

about the release of withheld payment. Contractor shall have ten (10) days thereafter to correct the cited reporting or record keeping practice deficiencies.

24. CONTRACTOR ACCESS TO SECURE STATE FACILITIES / CRIMINAL CONVICTION INFORMATION / FORMER FELONS: The Contractor shall provide (at its own expense) the Department with sufficient personal information about its agents or employees, and the agents and employees of its subcontractors (if any) who will enter upon secure premises controlled, held, leased, or occupied by the State during the course of performing this contract so as to facilitate a criminal record check, at state expense, on such personnel by the Department. "Sufficient personal information" about its agents or employees, and the agents and employees of its subcontractors (if any) means for the Contractor to provide to the State Project Manager, in advance of any on-site work, a list of the full names of the designated employees, including their social security number, driver license number and state of issuance, and their birth date. Thereafter, on their first site visit, each contractor employee expected to work on-site shall be fingerprinted by the State, and the State is authorized to conduct a federal criminal background check based upon those fingerprints and personal information provided. Contractor, in executing any duty or exercising any right under this contract, shall not cause or permit any of its agents or employees, and the agents and employees of its subcontractors (if any) who have been convicted of a felony and certain misdemeanors to enter upon any premises controlled, held, leased, or occupied by the Department. A felony and misdemeanor are defined by the jurisdiction of the State of Utah, regardless of where the conviction occurred.

25. CONFIDENTIALITY

Contractor, and anyone for whom the Contractor may be liable, must maintain the confidentiality of any non-public personal information it receives from the Utah Department of Technology Services or any other state or public office received during the course of this contract. This includes any personal information contained in any other database. The personal information may be, but is not limited to, names, social security numbers, birth dates, address, credit card numbers and financial account numbers. The Utah Department of Technology Services reserves the right to identify additional reasonable types or categories of information that must be kept confidential by the Contractor and anyone for whom the Contractor may be liable. This duty of confidentiality shall be ongoing and survive the term of this contract.

26. SECURE PROTECTION AND HANDLING OF DATA

1. **Network Security:** Vendor agrees at all times to maintain network security that - at a minimum - includes: network firewall provisioning, intrusion detection, and regular third party penetration testing. Likewise vendor agrees to maintain network security that conforms to one of the following:
 - a. Those standards the State of Utah applies to its own network, as found at <http://www.dts.utah.gov> and elsewhere;
 - b. Current standards set forth and maintained by the National Institute of standards and Technology, includes those at: <http://web.nvd.nist.gov/view/ncp/repository/>; or
 - c. Any generally recognized comparable standard that Vendor then applies to its own network
2. **Data security:** Vendor agrees to protect and maintain the security of the State of Utah data with protection that is at least as good as or better than that maintained by the State of Utah. These security measures include maintaining secure environments that are patched and up to date with all appropriate security updates as designated, for example Microsoft Notification.
3. **Data Transmission:** vendor agrees that any and all transmission or exchange of system application data with the State of Utah and/or any other parties expressly designated by the State of Utah, shall take place via secure means, e.g. HTTPS or FTPS.

4. **Data Storage:** Vendor agrees that any and all State of Utah data will be stored, processed, and maintained solely on designated target servers and that no State of Utah data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless medium is in part of the Vendor's designated backup and recovery process.
5. **Data Encryption:** Vendor agrees to store all State of Utah backup data as part of its designated backup and recovery process in encrypted form, using no less than 128 bit key.
6. **Password Protection.** Vendor agrees that any portable or laptop computer that resides at any State of Utah facility has access to a State of Utah network, or stores any non-public State of Utah data is equipped with strong and secure password protection.
7. **Data Re-Use:** Vendor agrees that any and all data exchanged shall be used expressly and solely for the purpose enumerated in the Current Agreement. Data shall not be distributed, repurposed or shaped across other applications, environments, or business units of Vendor. Vendor further agrees that no state of Utah data of any kind shall be transmitted, exchanged or otherwise passed to other vendors or interested parties except on a case-by-case basis as specifically agreed to in writing by the State of Utah.
8. **Data Destruction:** The Vendor agrees that upon termination of this Agreement it shall erase, destroy, and render unreadable all State of Utah data from all non-state computer systems and backups, and certify in writing that these actions have been completed within 30 days of the termination of this Agreement or within 7 days of the request of an agent of the State of Utah, whichever shall come first.

27. NOTIFICATION AND DATA BREACHES

Vendor agrees to comply with all applicable laws that require the notification of individuals in the event of unauthorized release of personally-identifiable information or other event requiring notification in accordance with DTS 500-1250-PR1 Computer Incident Reporting Procedure. In the event of a data breach of any Vendor's security obligations or other event requiring notification under applicable law (§ 13-44-202, etc.), Vendor agrees to assume responsibility for informing all such individuals in accordance with applicable laws and to indemnify, hold harmless and defend the State of Utah against any claims, damages, or other harm related to such Notification Event.

(Updated September 18, 2010)

Instructions for Completion of ITSM SaaS Functionality Criteria Response

This vendor response questionnaire will be used to determine the vendor's functional capability and score. It is imperative that vendors answer the questions in accordance with the guidelines provided below. Vendors' responses shall be verified during the evaluation activities. It is also assumed that the vendor will provide full proof of the capabilities declared in this questionnaire. Failure by a vendor of providing an accurate assessment in their response will be grounds for disqualification from the selection process.

In the capabilities response tabs "Vendor & Product Info", "Pricing & Services" and "Technical Foundation", the vendor is only required to provide descriptive guidance in the vendor comments column. Vendors' responses in these three tabs will be scored by DTS personnel. Please provide the best descriptive guidance in the comments columns.

In the functional response tabs "Functional Foundation", "Incident", "Problem", "Knowledge Management", "Change", "Self-Service", "Asset Management", "CMDB", and "SRM" vendors can choose from five options to indicate their compliance with each requirement.:

- 0 — Functionality not provided:** Not included in the proposed IT service desk tool.
- 1 — Partial functionality provided with customization:** The vendor can provide the functionality in a limited way, but an additional product, customization or work-around is required.
- 2 — Partial functionality provided out of the box:** The vendor provides the functionality in a limited way from its own code base. No additional product, customization or work-around can provide the full functionality.
- 3 — Full functionality provided through customization:** The vendor can provide the functionality, but an additional product, customization or work-around is required.
- 4 — Full functionality provided out of the box:** The vendor provides the functionality from its own code base. No additional product, customization or work-around is required.

Additional Notes to the Vendor:

Vendors are cautioned not to indicate functionality as "included in standard offering" when, in fact, that particular function is in development. If this is the case, then vendors should note this fact in the comments column and indicate the expected date such features will be made available. By responding to the affirmative to the capability of an item, the vendor is stating that the item is already developed and fully supported.

Vendor Name

Acronym Key

- OOTB: out of the box
- RFC: request for change
- CI: configuration item
- RCA: root cause analysis
- SaaS: software as a service
- GSA: General Services Administration
- API: application programming interface
- LDAP: Lightweight Directory Access Protocol
- HIPAA: Health Insurance Portability and Accountability Act

RFP EVALUATION SCORESHEET
DTS ITSM Saas Solution

Solicitation #			
Firm Name:		Vendor Name	
Evaluator:			
Date:			
		Average Score	Weight
		Total Points	
Criteria			
Vendor & Product Information			
Product History and Scope	0		0
Product Capabilities — Beyond Requested Scope	0		0
References	0		0
Pricing & Services			
Vendor Product and Maintenance Pricing	0		0
Training Services and Support	1		0
Technical Foundation			
Architecture	0		0
Physical Architecture	0		0
Technical Platform	0		0
Technical Strategy	0		0
Failover Capability	0		0
High Availability	0		0
Security	0		0
Authentication	0		0
Functional Foundation			
Installation & Upgrade	#DIV/0!		#DIV/0!
Architecture	#DIV/0!		#DIV/0!
Application Security	#DIV/0!		#DIV/0!
Workflow	#DIV/0!		#DIV/0!
Survey	#DIV/0!		#DIV/0!
Usability	#DIV/0!		#DIV/0!
Reporting	#DIV/0!		#DIV/0!
Integration	#DIV/0!		#DIV/0!
Support	#DIV/0!		#DIV/0!
Incident Management			
Incident Process	#DIV/0!		#DIV/0!
Incident Reporting	#DIV/0!		#DIV/0!
Problem Management			
Problem Process	#DIV/0!		#DIV/0!
Problem Reporting	#DIV/0!		#DIV/0!
Knowledge Management			
Knowledge Process	#DIV/0!		#DIV/0!
Knowledge Reporting	#DIV/0!		#DIV/0!
Change Management			
Change Process	#DIV/0!		#DIV/0!
Change Reporting	#DIV/0!		#DIV/0!
Self Service Management			
Self Service Process	#DIV/0!		#DIV/0!

Self Service Reporting	#DIV/0!		#DIV/0!
Asset Management			
Asset Management Service	0		0
Asset Management Reporting	#DIV/0!		#DIV/0!
Configuration Mangement Database			
CMDB	#DIV/0!		#DIV/0!
CMDB Reporting	#DIV/0!		#DIV/0!
Service Request Management			
SRM Service	0		0
SRM Reporting	#DIV/0!		#DIV/0!
Additional Scoring			
Cost Proposal Scoring* (40 Points Possible)			
Total Evaluation Points			#DIV/0!

* Purchasing will use the following cost formula: The points assigned to each offerors cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An offeror whose Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is: $\text{Cost Points} \times (2 - \text{Proposed Price} / \text{Lowest Proposed Price})$.

Vendor and Product Information Response	Vendor Name	DTS Scoring
Criteria	Vendor Comments	DTS Scoring
Product and Service History		
Describe the history of your SaaS ITSM offerings, including initial release date, current version number and development history.		
Describe your product road map and strategy for the next three years.		
Describe third-party software packages that are required for your SaaS ITSM tool to function correctly (for example, application servers, Web servers, business intelligence (BI), databases, agents or clients for backup, or software distribution and security).		
Describe your process of new version releases and the application of service packs to the IT service desk tool.		
Describe your upgrade methodology, including the tracking system, not only to report on the status of the upgrade, but also to record problems and bugs.		
Provide a list of any user groups, social-networking sites or public discussion areas relating to your product or service offerings.		
Total Score		0
# Criteria		6
Average Product and Service History Score		0
Product Capabilities — Beyond Requested Scope		
Describe any other product capabilities and functions that may be of interest or value to the ITSM SaaS project.		
Total Score		0
References		
List references and what ITSM functions are in production		
Total Score		0

DTS scoring will be assigned as follows:
0 = Failure, no response
1 = Poor, inadequate, fails to meet requirement
2 = Fair, only partially responsive
3 = Average, meets minimum requirement
4 = Above average, exceeds minimum requirement
5 = Superior

Vendor Services, Product and Maintenance Pricing Requirements Response	Vendor Name	
Criteria	Vendor Comments	DTS Scoring
Vendor Product and Maintenance Pricing		
Describe your pricing model. For example, list all modules and their list prices, all role-based license types and their prices, and any initial server fee pricing. Are there alternatives such as fixed and floating licenses? Include typical installation and initial configuration charges. For example, for traditional licensing models, this might include an initial fee, per seat fee, and maintenance fees and terms.		
Describe your suite bundling options versus stand-alone modules.		
Do you extend terms and discounts negotiated to future purchases for a defined period of time?		
Describe additional costs for disaster recovery, staging or testing environments.		
Describe any special licensing required for administrators.		
Describe the costs for any APIs or integration engines to meet integration requirements listed in the functional requirements section.		
Describe the cost per end user for the ability to use self-service or knowledge base (if applicable).		
Do you offer subscription-based pricing (such as a SaaS or on-demand model)?		
Describe your pricing structure for SaaS or on-demand models. For example, is the billing per user per month?		
Describe the ability to move to and from SaaS and on-premises licensing.		
Describe your pricing to transition a client from an on-premise to a SaaS solution.		
Are published price lists publicly available on your website?		
Are discounted price lists available on the GSA site?		
Describe your pricing for the most-basic maintenance package, and summarize the services, deliverables and terms included (for example, bug fixes, patches, service packs and associated services).		
Describe your tiered pricing for the more-advanced maintenance package, and the deliverables, options and terms that differentiate it from the basic offering (including the period of coverage and response times).		
Do you price maintenance as a percentage of total discounted license purchases (as opposed to basing it on the list price)?		

Do you offer caps on year-over-year increases in maintenance fees?		
Do you provide for a source code escrow account that an organization can access in case a company is acquired or a product is discontinued?		
What percentage of your customers are on maintenance contracts? Detail the average duration of these contracts and the average renewal rate.		
How often to you release product updates?		
What is your release schedule and how far back previous releases are supported for?		
	Total Score	0
	# Criteria	21
	Average Vendor Product and Pricing Score	0
Training, Services and Support		
Describe your professional services during implementation (service desk, incident, problem, change); includes transition assistance.		1
Describe your professional services during implementation (asset management, service-level management and service catalog); includes workshops, best practices and documentation.		1
Describe your administration training (describe options and provide costs).		1
Describe your seat holder training (describe options and provide costs).		1
Describe any other miscellaneous costs to implement solution not already listed above to meet requirements.		1
Describe what is included in maintenance and support, and provide costs.		1
Describe various technical support options available during business hours and provide pricing.		1
Describe the costs for the development of any customization of the product that could be requested.		1
	Total Score	8
	# Criteria	8
	Average Training, Services and Support Score	1

DTS scoring will be assigned as follows:
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2 = Fair, only partially responsive
3 = Average, meets minimum requirement
4 = Above average, exceeds minimum requirement
5 = Superior

Vendor Technical Foundation	Vendor Name	
Criteria	Vendor Comments	DTS Scoring
Architecture		
Please provide any document and diagram describing the logical architecture of the application proposed. Please name all components such as workflow, transaction and reporting and interfaces between components.		
For each of the logical components, please provide a description containing the following information; name, purpose, technology,		
Total Score		0
# Criteria		2
Average Architecture Score		0
Physical Architecture		
For each of the logical components, please provide a description containing the following information; name, purpose, technology, and any additional characteristics.		
Phased installations – describe in detail how (if applicable) your product can be installed in a phased approach.		
If your product is sold by module, can the module be installed by region, limiting number of users (either regionally or globally), by function within module, etc.		
If your product is not available by discreet module – describe how your product can be phased in		
Published integrations.		
Interface Specifications/Description including API's or SDK's.		
Total Score		0
# Criteria		6
Average Physical Architecture Score		0
Technology Platform		
Please provide the Web browsers supported by your application (if applicable). Please include vendor, browser version and OS.		
Types of clients supported (web, mobile, terminal, windows).		
Dependency on third-party vendors (software, hardware, service).		
3rd party software licenses required (e.g., workflow tools, client-based software).		
Operating System.		
Versions of Unix, if applicable.		
Versions of AIX, if applicable.		
Versions of Windows, if applicable.		
Versions and build of Linux, if applicable		
Hardware. Please provide the list of supported hardware platforms.		
Describe connectivity options to vendor site.		

Load Balancing.		
Specify supported network protocols.		
POP3, IMAP and SMTP support.		
Ability to accept or send flat files (for interfacing with existing MS applications).		
Which DBMSs or proprietary data storage mechanisms does your application utilize and support?		
Describe the use of database triggers and stored procedures within your application.		
App Servers/Messaging Based on standard enterprise app servers and Messaging (J2EE: Web logic, Web sphere); .NET).		
Certification of Application Servers.		
Integration of web services with application servers.		
Multi-level message log.		
Multi-entity and multi-language support (double-byte characters).		
		Total Score
		0
		# Criteria
		22
		Average Technology Platform Score
		0
Technology Strategy		
What are your future technology initiatives that would impact the application (i.e. rebuilds, sun-setting or end-of-living technology)?		
Please provide the Architecture and Design principles used by your company.		
How do you plan to improve the application technologically in the next 2-3 years?		
		Total Score
		0
		# Criteria
		3
		Average Technology Strategy Score
		0
Failover Capability		
Please identify all the logical components (from the logical architecture) that can fail over automatically in case of failure.		
Please describe how the logical components identified above fail over and what is the impact for the systems connected to it.		
Please identify all the physical components (from the logical architecture) that can fail over automatically in case of failure.		
Please describe how the physical components identified above fail over and what is the impact for the systems connected to it.		
		Total Score
		0
		# Criteria
		4
		Average Fail Over Capability Score
		0
High Availability		
Identify all the logical components (from the logical architecture) that are highly available.		

Describe how the component fails over and what infrastructure is required for the component to be highly available.		
Identify all the physical components (from the physical architecture) that are highly available.		
Describe how the component fails over and what infrastructure is required for the component to be highly available.		
Total Score		0
# Criteria		4
Average High Availability Score		0
Security		
Please describe how the system enforces data integrity (within one and across multiple data stores).		
Please describe how the system can avoid loss of data integrity when failing.		
Please describe how the system enforces processing integrity (within one and across multiple functional transactions).		
Please describe how the system can avoid loss of process integrity when failing (i.e. 2 phase commit, etc...).		
Total Score		0
# Criteria		4
Average Security Score		0
Authentication		
Please describe how the application(s) manages and store authentication for users.		
Single sign-on available across applications.		
Used single sign-on technology.		
Total Score		0
# Criteria		3
Average Authentication Score		0

DTS scoring will be assigned as follows:
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2 = Fair, only partially responsive
3 = Average, meets minimum requirement
4 = Above average, exceeds minimum requirement
5 = Superior

Company and Technical Functional Requirements Response	Vendor Name	
	Vendor Response	Vendor Comments
Criteria		
Installation and Upgrade		
Product installs easily (if applicable); components don't have to be manually installed		
Installation of product and various modules takes the appropriate amount of time and resources		
Ability to provide OOTB best practices and templates that can be configured, rather than having to create them from scratch		
Availability and expertise of implementation resources from vendor and partners		
Direct API access with application integration methods supported, such as Java Platform, Enterprise Edition (Java EE), Enterprise JavaBeans (EJB), etc.		
Vendor has a clear upgrade road map		
Total Score	0	
# Criteria	6	
Average Installation Score	#DIV/0!	
Architecture		
Ability to meet hardware, operating system and database requirements		
Ability to support Web browser clients and Web services		
Ability to support directories, such as LDAP and Active Directory		
Ability to meet backup, restore, high-availability and disaster recovery requirements		
Solution can scale to meet your number of supported users and geographies		
Ability to support Unicode and multiple language support		
Ability for the tool to provide multitenancy technology to reach across business units, regions and languages with a single, unified solution		
Ability to support integration with mobile devices		
Ability to meet archive, backup and purge requirements		
Ability to meet data integrity requirements		
Ability to meet the requirements of a "follow the sun" support center		
Ability to configure and maintain staging, testing and production environment		

Direct API access offering Java Platform, Enterprise Edition (Java EE), Enterprise JavaBeans (EJB), etc.		
Offers integration via a contact user gateway to LDAP, CSV/XML and other databases		
Offers integration to event and alert monitoring tools		
Total Score	0	
# Criteria	15	
Average Architecture Score	#DIV/0!	
Application Security		
Ability to support security controls over submission and approvals		
Ability to support security controls over modification of records		
Ability to assign roles-based access rights and privileges		
Ability to support encryption and SSL		
Ability to capture audit trails of access and changes made to the application		
Ability to restrict viewing of certain data fields based on login role		
Provides security controls for data protection; meets standards for regulatory requirements, such as HIPAA		
Ability to configure account expiration information and session timeouts after a predetermined amount of inactivity		
Ability to support single sign-on		
Ability to audit logs and report on user account activity, rights and privileges		
Total Score	0	
# Criteria	10	
Average Security Score	#DIV/0!	
Workflow		
Ability to support automatic assignment of a record by: <ul style="list-style-type: none"> • Categorization/Type • Status • Severity, SLA and/or Priority • Date and Time (Calendar Routing) • Agent/Analyst Skills 		
Ability to support automatic escalation of a record by: <ul style="list-style-type: none"> • Categorization/Type • Status • Severity, SLA and/or Priority • Date and Time (Calendar Routing) • Agent/Analyst Skills 		
Ability to support automated escalation capabilities, such as automatic end-of-shift routing		

Ability to support parent/child inheritance between like records for priority, severity and escalation, and any other desired field attributes		
Ability to support both functional and hierarchical escalation		
Ability to edit and display workflows graphically		
Ability for tasks to be assigned and managed sequentially or in parallel		
Ability to configure alerts for SLA threshold activity based on individual preferences		
Ability to manage SLA metrics when cases are assigned/reassigned within workflow		
Ability to automate routing of approvals/rejections based on predefined business rules and roles, including product, account code, etc.		
Ability to generate unique IDs for service requests, incidents, problems, changes and release records		
Total Score	0	
# Criteria	11	
Average Workflow Score	#DIV/0!	
Survey		
Ability to compose a survey/questionnaire that scores various aspects of the service provided by the service desk		
Ability to integrate data with HDI survey service.		
Ability to send out an e-mail/link to customer satisfaction survey to a customer requesting feedback on support		
Ability to generate scores received from a survey activity		
Total Score	0	
# Criteria	4	
Average Survey Score	#DIV/0!	
Usability		
Ability to configure the graphical user interface by dynamically adding windows or fields		
Ability for the solution to provide simple, Web-based graphical user interface		
Ability of the solution to enable rapid deployment of new users and administration of existing users		
Ability to configure the graphical user interface based on individual, group or role-based preferences (colors, layout, etc.)		
Ability to support object-specific pop-up menus in the graphical user interface		
Ability to support hot topic or news flash window within the graphical user interface		

Availability of Web client and desktop client with similar capabilities		
Ability to provide industry and ITIL best-practice processes, categorization and templates embedded in tool		
Ability to search by description		
Ability to export search results		
Ability to use a nickname or preferred name in contacts.		
Ability to record an alternate location		
Ability to add attachments		
Ability to set different time-zones based upon local business hours.		
Total Score	0	
# Criteria	14	
Average Usability Score	#DIV/0!	
Reporting		
Ability to easily construct queries and reports from any combination of database fields; support for real-time queries at different levels (parent, child, case, subcase)		
Ability to provide real-time reporting via graphical and configurable dashboards		
Ability to produce scheduled reports automatically based on a defined schedule and e-mail to predetermined recipients		
Ability to "drill down" on any displayed and selected field, in detailed or summary-level reports		
Ability to select from a list of online reports to run in real-time against current or archived databases		
Ability to integrate with external reporting tools and to meet company reporting standards		
Ability to create ad hoc reports		
Ability of vendor to include OOTB/predefined reports that can be modified		
Ability to export report information into flat file, spreadsheet and/or database formats		
Total Score	0	
# Criteria	9	
Average Reporting Score	#DIV/0!	
Integration		
Ability to integrate asset records from Up_time		
Ability to integrate asset records from Zenworks		

Ability to integrate asset records from LanDesk		
Ability to integrate asset records from StatSeeker		
Total Score	0	
# Criteria	4	
Average Support Score	#DIV/0!	
Support		
References report that support resources are knowledgeable, helpful and efficient.		
Vendor support resources are available at the times required (e.g., Monday through Friday, 8 a.m. to 5 p.m.; 24/7; etc.)		
The product is well-documented on vendor website, and active user communities exist to solve technical problems		
Consulting and support expertise is available in the required geographies		
Training is available online and in person		
The vendor understands the level of training that is recommended for the different roles (e.g., expert user, tool administrator, casual user)		
Total Score	0	
# Criteria	6	
Average Support Score	#DIV/0!	

Incident

Incident Management Functional Requirement Response	Vendor Name	
	Vendor	Vendor
Criteria	Response	Comments
Incident Process		
Ability to provide configurable incident process and categorization templates out of the box (OOTB)		
Ability to provide OOTB standard required incident record data fields		
Ability to provide OOTB incident process templates based on industry best practices and/or ITIL		
Ability to support hierarchical escalation, both manually and via business rules, upon incident status change, priority change and/or service-level clock expiration		
Ability of the tool to facilitate the automatic prioritization, assignment and escalation of Incidents based on the record categorization, impact and urgency		
Ability to prevent closure of an incident before all assignments have been resolved and mandatory fields that can be custom set are completed		
Ability to support bidirectional communication of Incident information to and from the end user via e-mail		
Ability to support highly flexible routing of incidents based on available resources located across multiple sites and other factors, such as time of day, tiered service values, etc.		
Ability to differentiate between an incident and a service request		
Ability to spawn one or more incident(s) to a problem, and to link all related incidents to the problem, with corresponding notifications		
Ability to select and create "quick incidents" from a list of predefined and/or customized templates with prepopulated content, such as categorization, text, etc.		
Ability to open an RFC against an incident, and automatic population of the RFC		
Ability to manage and link incident records to multiple SLAs and tiers of service based on IT customer groups or associated lines of business		
Ability to search the existence of any duplicate, currently open incident or problem tickets		
Ability to search knowledge base for solutions/work-arounds, and to push knowledge base articles that match error categorization. Ability to feed knowledge base from incident resolutions.		
Ability to automatically escalate and notify one or more groups when an incident has not been started or completed on time		
Ability to denote particular customers or groups of customers as "VIP" status, indicating a higher level of service		

Incident

Ability to create subtasks within incident records		
Ability to integrate with event and alert monitoring tools, and allow for automatic creation, update and closure of tickets from these tools		
Ability to link incidents to a configuration item (CI), group of CIs or a service		
Ability to integrate with chat tools, remote-control tools and phone systems		
Ability to put incident tickets "on hold," by status definition, with time excluded from the SLA/operating-level agreement (OLA)		
Ability to allow for multiple types of alerts (via pager and e-mail), including deadline alerts, excessive reassignment alerts and inactivity alerts		
Ability to track the total amount of time the incident was worked on and how long it was open		
Ability to send an online survey upon closure of an incident ticket		
Ability to create an incident ticket from a current open ticket where the customer is experiencing the same issue.		
Ability to intergrate with other application regarding inventory and billing information. (Aries and EIS)		
Closed incidents will automatically removed related bulletin board entry.		
Facilitates manual and automatic assignment of incidents based on selected criteria.		
Assignment groups and assignment individuals will allow auto-fill searches and completion		
Total Score	0	
# Criteria	30	
Average Incident Process Score	#DIV/0!	
Incident Reporting		
Ability to support a real-time dashboard display of particular incidents by technician and IT group		
Ability to report incidents by priority, categorization, service-level adherence, technician and CI		
Ability to run incident age report		
Ability to report incidents linked to problem records		
Ability to report CIs impacted by an incident		
Ability to report time spent and materials used by incidents		
Ability to report first-contact resolution rate		
Ability to report mean time to resolution		
Ability to report tickets by demand channel		
Ability to perform trend analysis of tickets		
Total Score	0	
# Criteria	10	
Average Incident Reporting Score	#DIV/0!	

Problem Management Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Criteria		
Problem Process		
Ability to provide configurable problem process and categorization templates OOTB		
Ability to provide OOTB standard required problem record data fields		
Provide OOTB problem process templates based on industry best practices and/or ITIL		
Ability to support distinct incident records and problem management processes, metrics and reporting		
Ability to prevent closure of a problem before all assignments have been resolved		
Ability to prevent closure of an incident before all problem assignments have been resolved and mandatory fields are completed		
Ability to automatically update status or close all related incidents to a problem upon updating of status or closure of the problem		
Ability to integrate problem management with incident and change management		
Ability to automate opening of a problem record from an incident record based on business rules and SLAs		
Ability to integrate with event and alert monitoring tools, and allow for automatic creation, update and closure of tickets from these tools		
Ability to provide for documenting and managing knowledge artifacts pertaining to problem and error control (e.g., data entry point for knowledge management databases, posting of FAQs)		
Ability to view impacted CIs from within a problem record, and to view upstream and downstream affected CIs and IT services through a visual depiction		
Ability to track the total amount of time the problem was worked on and how long it was open		
Ability to link problems/known error records to a CI, group of CIs or a service		
Ability to facilitate the creation, modification and closure of problem records		
Ability to assign impact and urgency codes to problem records		
Total Score	0	

	# Criteria	16
	Average Problem Process Score	#DIV/0!
Problem Reporting		
Ability to support a real-time dashboard display of particular problems		
Ability to support generation of problem management reporting and trending information		
Ability to report the number of problems by priority		
Ability to report the number of problems per month		
Ability to report the number of problem records reopened		
Ability to report the number of assigned problems with known errors documented		
Ability to report the number of related incidents or events occurring before the problem record is closed		
Ability to report the number of RCA reviews in progress as a percent of total problems logged		
	Total Score	0
	# Criteria	8
	Average Problem Reporting Score	#DIV/0!

Knowledge Management Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Knowledge Process		
Ability to provide knowledge management capabilities by floating the most relevant hits to the top, in order of closest match to search		
Ease of administering the weighting and relevancy scores associated with knowledge articles		
Ability to launch fast knowledge searches using the categorization (or partial categorization) selections as key value search parameters		
Ability to create a knowledge article via a fill-in-the-blank form		
Ability to automatically populate a knowledge article into an incident		
Ability to support role-based knowledge items (i.e., a technical role can access either technical-facing or customer-facing articles)		
The ability to automatically create knowledge management entries from incident, problem and change modules		
Ability to manage full life cycle of knowledge articles through administration capabilities (e.g., submission, editing, review, approval, publishing, usage monitoring, etc.)		
Ability for knowledge management database to be restricted access by role		
Ability for tool's knowledge management database to search other knowledge bases in environment		
Ability to have a rich-text editor (RTE) that supports links within documents, document-to-document links and attaching images to documents		
Ability to provide automated administration (ease of adding, editing and maintaining the data, and ability for end-user submission to require review/approval prior to posting)		
Ability to have a defined workflow process for reviewing and approving pending knowledge articles that can be displayed graphically		
Ability to make certain fields in the knowledge article template mandatory		
Ability to embed Web links, images and objects into knowledge articles (e.g., screenshots, etc.)		

Ability to support a variety of search methodologies, including metadata, fuzzy searching, hierarchical/drill-downs, cross-references, attribute queries, category, Web and file system external library searches, and to utilize natural language and proper stemming, and Boolean search methodology		
Ability to allow user feedback to rate/score content for usefulness related to the inquiry		
Ability to provide knowledge-centered support (KCS) standards and guidelines		
Total Score	0	
# Criteria	18	
Average Knowledge Process Score	#DIV/0!	
Knowledge Reporting		
Ability to support the generation of knowledge management reporting and trending information		
Ability to provide reports for failed and successful knowledge base searches		
Ability to provide reports of the usage of all knowledge management articles		
Ability to provide reports on which technicians are involved in knowledge management articles		
Total Score	0	
# Criteria	4	
Average Knowledge Reporting Score	#DIV/0!	

Change Management Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Change Process		
Ability to provide configurable change process and categorization templates OOTB		
Provide OOTB templated workflow best practices and/or ITIL for emergency, normal and preapproved change		
Provide OOTB basic required change record data fields		
Ability to document back-out procedures, installation and turnover documents within the RFC		
Ability to prevent closure of a change before all assignments have been resolved		
Ability to relate postimplementation incidents and problems resulting from an implemented change		
Ability to create subactivities or task records for a specific change record, for separate assignment to an individual, group or vendor		
Ability to calculate an objective risk assessment considering business impact, affected application/business services criticality, collision, historical change information, and compliance with maintenance windows and black-out periods		
Ability to provide proactive notification to stakeholders and change advisory board (CAB) members for changes with critical business impact, collisions and compliancy issues		
Ability to provide role-based approval, retracting or rescheduling of RFCs		
Ability to support release and deployment management as part of the change process		
Ability to automatically create a change request for unauthorized changes to CIs		
Ability to integrate forward schedule of changes (FSC) with Microsoft Exchange calendaring system		
Ability to automatically produce the change schedule (FSC) in an HTML format that can be published to a Web server		
Ability to provide a change calendar with scheduled change viewing by group, and to customize the sorting and filtering of calendar views		
Ability to allow for scheduling of recurring events, such as certain types of maintenance		

Ability to support maintenance, release and moratoriums (locked status) for freeze windows		
Ability to easily identify the affected CIs whenever a change is made to a particular CI		
Ability to automatically generate risk and impact analysis of multiple RFCs, and provide visual depictions of upstream and downstream CIs that can be navigated in a configuration management database (CMDB)		
Ability to support a "virtual" CAB (i.e., approvals/issues submitted and stored electronically)		
Ability to select and create "preapproved changes" from a list of predefined templates with prepopulated content, such as categorization, text, etc.		
Ability to promote one or more RFC(s) to a release, with corresponding notifications		
Provide change workflow feeds into release workflow		
Ability to open an RFC against an incident/problem/known error record, and automatic population of the RFC		
Total Score	0	
# Criteria	24	
Average ITCM Process Score	#DIV/0!	
Change Reporting		
Ability to support the generation of change management reporting and trending information		
Ability to support a real-time dashboard display of particular changes (at a minimum, emergency and successful changes)		
Ability to view history of a CR, i.e who made what approval/change		
Ability to report number and percentage of changes (successful/failed/backed out)		
Ability to report percentage of emergency changes		
Ability to report total number of changes by time, type, class and category		
Ability to report percentage of changes noted as closed within five days		
Ability to report percentage of changes canceled and/or rejected		
Ability to report incident to change ratios		
Ability to report on the business impact of failed changes		
Total Score	0	
# Criteria	10	
Average ITCM Reporting Score	#DIV/0!	

Self-Service Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Criteria	Vendor Response	Vendor Comments
Self-Service		
Ability to provide a customer self-service portal where a customer may access knowledge base articles and FAQs, submit and update requests, and monitor the status of their requests		
Ability to provide an end-user interface through which employees can order standardized IT goods and services		
Ability for the end user to search knowledge base for solution via keyword, Boolean operators and full-text search		
Ability to provide a "suggestion box" for soliciting feedback on process and interface		
Ability to associate end users with specific groups, lines of business, etc., and to tailor presented content, information and self-service options according to rule-based "subscriptions" for roles or groups		
Ability to provide a list of "top 10" common FAQs searched, with automated updates based on update rules		
Ability to develop, deliver and manage survey of end users supporting self-service usage		
Ability to integrate chat to support self-service usage		
Availability of a hot topic or news flash window within the graphical user interface		
Ability to brand self-service portal		
Availability of a bulletin board frame function for current major problems, such as outages and scheduled downtimes		
Customer self-service portal is user friendly and can be quickly completed by the customer.		
Customer self service portal should auto-populate customer information using a master directory link to staff information		
Total Score	0	
# Criteria	13	
Average Self-Service Score	#DIV/0!	
Reporting		
Ability to support the generation of self-service reporting and trending information		
Ability to report on usage by end user, location department, region, etc.		
Total Score	0	
# Criteria	2	
Average Self-Service Reporting Score	#DIV/0!	

Asset Management Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Criteria		
IT Asset Management (ITAM) Service		
General Requirements		
Ability to provide an intuitive, simple user interface(s)		
Ability to include a notification process at each step through the ITAM lifecycle as well as at every change made to an asset		
Ability to support both physical and virtual assets through the entire lifecycle of the asset		
Ability to provide full transparency to the tool across multiple organizations and its reporting functions and be configurable for different levels of access		
Ability to integrate with the purchasing process		
Ability to integrate with the receiving process		
Ability to provide sufficient training for resources responsible for creating CIs and maintaining the asset management functionality		
Ability to enforce quality control through standardized configurations as much as possible. Required field completion will be necessary prior to an asset moving from one step to the next. There needs to be an exception process that will allow for management of non-standard configurations.		
Ability to provide a clear workflow and process defined and followed that gives all working groups the ability to track the asset status, location of the asset, and person responsible for the asset for the entire life cycle of the asset. The asset lifecycle must follow an approval path.		
Ability to have the ability to tie an incident to an asset		
Ability to replace the manual year-end inventory process by supporting mobile device interfaces for inventory taking and tracking.		
Ability to have an efficient logging process to capture modifications		
Ability to support integration into the DTS authentication system for log-in.		
Ability to create custom product requests forms which will electronically feed the Asset Management tool		
Ability to track and manage contracts and purchases against those contracts.		

Ability to notify users about expiring contracts		
Ability to customize notifications throughout the workflow associated with product requests, etc.		
Ability to track business cases and to manage purchases against them.		
Ability to increment/decrement or activate/inactivate assets directly from service orders.		
Purchase Asset		
Ability to allow user to be able to select standard configured asset (laptop, desktop, etc.). User-friendly creation of a purchase order (PO) with corresponding line items.		
Ability to allow user to be able to select non-standard configurations (additional RAM, etc.) that move through the same approval path as the associated hardware		
Ability to allow user to be able to select non-standard configurations (ad-hoc purchase) and define/create approval paths for PO to follow.		
Ability to send and customize automated email/text notification throughout PO process based on status		
Ability to interface into existing financial system.		
Ability to communicate directly to vendors via webservice to track and manage orders.		
Ability to easily create or customize tracking functions and reporting.		
Receive Asset		
Ability to receive assets and notify "Requested by" individual(s) via email or text upon receipt of product once all line items on the PO are received.		
Ability to restrict notification based on asset type.		
Ability to notify based on status throughout receiving process.		
Ability to notify base on receipt of specific line item.		
Ability to put to he asset into inventory at the time of receipt		
Ability to integrate into a bar-coding process where feasible.		
Ability to create an invoice at the time the asset is "received". An asset can be marked as received at the time of physical receipt or at the time of the completion of a work order that included the installation of the asset, etc.		
Ability to have an efficient logging process to capture modifications to the asset		

Ability to interface into existing financial system.		
Provision Asset		
Ability to allow the user to be able to assign asset to organization, agency, individual, location, port, etc.		
Ability to allow the user to configure that asset at the time the asset is provisioned.		
Ability to create relationships between CIs at the time the asset is provisioned.		
Ability to have an efficient logging process to capture modifications to the asset		
Commission Asset		
Ability to allow the user to be able to status the asset as "live" or "in service"		
Ability to interface with billing system via a billing status (physical and virtual asset) to trigger the billing process		
Ability to have an efficient logging process to capture modifications to the asset		
Maintenance of Asset		
Ability to allow the user to keep all provisioning configuration information current as well as allow the user to add additional configurations and relationships (i.e. adding software), which could require additional approvals		
Ability to control status changes by rights/roles.		
Ability to notification on any status change		
Ability to have an efficient logging process to capture changes to asset status		
Ability to maintain current OS patch level and virus protection version information for each asset either through auto discovery tool interfaces or interfaces with other DTS databases that contain that information.		
Decommission Asset		
Ability to allow users to make changes to assets which include configuration, status, and relationship changes.		
Ability to interface with 3rd party vendors/agencies via auto-generated email, file extraction/delivery, etc. based on status change. The interfaces must include the necessary forms as part of the information sent.		
Ability to have an efficient logging process to capture modifications.		
Ability to monitor and track licensing compliance for an asset.		
Existing Tool Interface Requirements		
Ability to allow the user to be able to apply statistical information from 3 rd party software currently utilized by DTS for assets managed in ITAM system.		

Ability to interface with TUAM so that billing can be an automated based on actual assets in inventory.		
Ability to interface with the discovery tools used by the user groups (i.e. Zenworks, Up_time, etc.) and populate patch level information that can be audited and reported on.		
Ability to interface with the capacity planning tools used by the user groups (i.e. up_time, StatSeeker, Zenworks, other vendors) and populate capacity threshold information by asset that can be audited and reported on.		
Ability to do impact analysis based on relationships defined between any asset, application, group, etc.		
Ability to interface with/populate a CMDB.		
Ability to interface with 3 rd party vendors in order to facilitate changes in asset status (i.e. address changes, current versioning, etc.) for support purposes. This interface will also create efficiencies in invoice to inventory matching processes.		
Ability to be able to import initial inventory information in the form of an Excel/.csv, report.		
Total Score	0	
# Criteria	50	
Average Asset Management Score	0	
Reporting		
Ability to provide flexible and user-friendly reporting capabilities that allow reporting on a defined list of asset characteristics (e.g. status, location, age, etc.). There must be a way to export the reports from the system into an Excel, .csv, Word, etc. format.		
Ability to be able to provide accurate reporting to conduct financial auditing on current inventories in order to support accurate inter-agency billing.		
Ability to provide reporting that will enable reconciliation between billing and inventory.		
Total Score	0	
# Criteria	3	
Average Asset Management Reporting Score	#DIV/0!	

Configuration Management Database Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Criteria		
CMDB		
Ability to ceate logging and audit trails on admin activities (system changes).		
Ability to define configuration item classes. Tool should have OOTB common CI classes, however be able to support unlimited extension of new CI classes and the ability to create new classes with unique attributes.		
Ability to create a Business Service with relationsp information of suporting technology and instruction		
Ability to perform auto-discovery		
Ability to push data into database using an API.		
Ability to create and modify a CI using an API		
Ability to retrieve CI information using an API		
Ability to customize workflow.		
Ability to configure screens. Add/remove fields, move fields around the screen. Creation of customer data fields should be simple and fully supported by upgrades and reporting.		
Ability to configure lists. Lists and queues should be editable by administrators		
Ability to identify mandatory fields on the screen.		
Ability to make fiels conditionally appear/disappear, mandatory, read only, etc. should be flexiby and easy to configure. When fileds are hidden from the screen, they should not take up screen realestate.		
Ability for the navigation menu to be dynamicy by role, and should be editable by administrators to change behavior, add new options, reorganize menu layout, etc.		
Ability to add new tables and columns. Should be simple to perofmr through the UI and be fully supported for upgrades and reporting.		
Ability to integrate with DTS authentication (LDAP/Active Directory)		
Total Score	0	
# Criteria	15	
Average CMDB Score	#DIV/0!	
Reporting		
Ability to define reports, dashboards, and analytics.		
Ability to create custom repors based on requirements. Report design should be intuitive and easy.		
Ability to publish reports in a format that anyone in the organization can see without the need for a license to the software.		
Total Score	0	
# Criteria	3	
Average CMDB Reporting Score	#DIV/0!	

Service Request Management Functional Requirement Response	Vendor Name	
	Vendor Response	Vendor Comments
Service Request Management		
The ability to allow users to easily find and order any product and service within the online service catalogue.	0	
The ability to allow the user to track the status of their order from the time of order, through delivery.	0	
The ability to automatically send email and/or text notification to users of the status of their order based on order status change.	0	
Ability to allow administrators to easily add and/or modify products and services within the catalogue.	0	
Ability to automatically create and deliver work orders to appropriate individual or group for fulfillment of service request.	0	
Ability to allow administrators to easily define, add and/or modify work flow of service request orders	0	
Total Score	0	
# Criteria	6	
Average SRM Score	0	
Reporting		
Ability to provide flexible and user-friendly reporting capabilities that allow reporting on a defined list of service request characteristics (e.g. person who placed order, person fulfilling the order, status of order, etc.). There must be a way to export the reports from the system into an Excel, .csv, Word, etc. format.		
Total Score	0	
# Criteria	1	
Average SRM Reporting Score	#DIV/0!	

ITSM SAAS Solution Bid #PR12040 COST PROPOSAL

Bidder Name: _____

- 1. Provide a price for an enterprise software license as described for the products identified in your technical offer. This price must also include the first year of maintenance and support fees.

Enterprise Licensing Fee with first year of maintenance included: \$ _____

- 2. Provide pricing for maintenance and support fees for the second through third year of product ownership.

Maintenance and Support Fees B Year 2 \$ _____

Maintenance and Support Fees B Year 3 \$ _____

- 3. List the name, job title and hourly rate for any proposed consultants:

Name: _____ Title: _____ \$ _____ / hour

Name: _____ Title: _____ \$ _____ / hour

Name: _____ Title: _____ \$ _____ / hour

- 4. Provide a per person training cost for any training that is recommended for employees that will be responsible for the installation and operation of the products included in this offer. Assume that the training will be held at one of your training facilities. Specify if the rate is hourly, daily, etc.

\$ _____

- 5. Anticipated cost of customizations, including upgrades performed by vendor: \$ _____/hr

Any deviation from this format may result in disqualification of proposal

Question and Answers for Bid #PR12040 - DTS/ITSM SAAS Solution

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.