

BIDDING REQUIREMENTS for PURCHASING

NOTICE AND INFORMATION FOR BIDDERS

Attachment A: Bid Breakdown & Schedule

Bidder: _____

DASNY Contact: Theresa Graffeo, Purchasing Coordinator
tgraffeo@dasny.org

Request for Information (RFI's): RFI's due September 19, 2022. Submit in writing via email to tgraffeo@dasny.org. Responses will be posted to DASNY's website via addenda no later than September 21, 2022. It is the responsibility of the Bidder to obtain Addenda.

Services/Product Required By: DASNY anticipates a vendor starting on or about October 17, 2022

Description: Provide Salesforce Licenses and Implementation Services

Bid Open Location: DASNY, Corporate Headquarters, 515 Broadway, Albany, NY 12207

Bid Open Date and Time: October 3, 2022 at 2:30PM

Item No.	Manufacturer	Make/Model	Description	QTY	UOM	Unit Price	Extended Price
1	Carahsoft Technology Corporation	210-CCGS-CMP	Managed Package of Cloud Services. Please see Attachment B for further detail.	30	EA	\$	\$
2	Carahsoft Technology Corporation	210-CCGS-CMP	Managed Package of Cloud Services. Please see Attachment B for further detail.	1000	EA	\$	\$
3			Salesforce ITS (Information Technology Services) Helpdesk Solution (Cloud Based) and implementation vendor services. Please see Attachment C for further detail.		LS	\$	\$

TOTAL BID _____

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(The below questions 1) and 2) need only be answered if the above total bid is for one million dollars or more)

- 1. Does your firm anticipate the use of subcontractors and outside suppliers specific to this procurement
Yes No
- 2. Does your firm anticipate the creation of employment opportunities arising from this procurement?
Yes No

(The below information must be completed for all bids.)

Identify all subcontractors, if any: _____

STATE, PROVINCE FOR FOREIGN COUNTRY
THAT YOUR FIRM'S PRINCIPAL PLACE OF
BUSINESS IS LOCATED:

ADDRESS OF FACTORY OR PLANT WHERE
ITEMS ARE MANUFACTURED AND/OR
ASSEMBLED. *(Attach additional sheet(s) if more
than one manufacturer)*

BIDDER (FIRM NAME)

SIGNATURE

NAME (TYPE/PRINTED)

TITLE

Date

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Attachment B: Detailed Specifications

<u>PART NO.</u>	<u>DESCRIPTION</u>	<u>QTY</u>
210-CCGS-CMP	Provide Customer with a Managed Package of Cloud Services to set up and use, including but not limited to; - Case Management - Cloud Consumption - Client Engagement - Complaint Management Includes: Employee Service Agent EE (Quantity 1), Government Cloud Plus, Premier Success Plan	30
210-CCGS-CMP	Provide Customer with a Managed Package of Cloud Services to set up and use, including but not limited to; - Case Management - Cloud Consumption - Client Engagement - Complaint Management Includes: IT Service Center - Endpoint Management, Government Cloud Plus	1000

Includes:

- Employee Service Agent EE (Quantity 30)
- IT Service Center Endpoint Management (Quantity 1000)
- Government Cloud Plus
- Premier Success Plan

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Attachment C: Scope of Work

Statement of Work for Salesforce ITS Helpdesk Solution

The Dormitory Authority of the State of New York is looking to purchase the Salesforce ITS (Information Technology Services) Helpdesk Solution (Cloud Based) and implementation vendor services, which meets the requirements of the Authority as stated below.

At a minimum, the ITS helpdesk solution should contain the following core modules: Incident Management, Service Request, Problem Management, Change Management, Service Catalog, Service Portfolio, and Asset Management. It should also contain reporting capabilities of various metrics and provide analytics with dashboard functionality.

The selected implementation vendor must have experience with multiple implementations of specific Salesforce ITS Helpdesk solutions, with experience in configuring each module. This implementation may require the integration with other DASNY (Dormitory Authority of the State of New York) systems, such as but not limited to; Active Directory, Human Resources and Financial applications. Converting various data from our current ChangeGear helpdesk application is also required. Additional experience implementing solutions requiring access management tools and methodology is highly recommended.

Incident Management Module:

These are typically issues that can be handled within 24-48 hours (about 2 days), with a minimum of IT resources. The module should be to:

- Create unlimited custom webpage with fields important to DASNY (Dormitory Authority of the State of New York) for tracking
- Create a ticket directly from email
- Auto route ticket based on configurable business rules
- Automatically notify status change to endures about their tickets
- SLA (Service Level Agreement) compliance rules management
- Periodically update from AD (Active Directory) to ensure auto prepopulating of ticking information
- Attach files and documents to routed tickets
- Copy and paste screen shots into incident ticket
- Unlimited type of forms to create custom field
- Auto route to group and team member claims tickets
- Assign tickets by priority
- Hi-lighting rule for VIP ticketers
- SLA gets escalated by time and sent to managers or their designee
- Capture user sentiment regarding service
- Build multiple Service Catalog in a ticket
- Has a visual workflow editor
- Has a graphical forms designer
- Create templates for various incident types
- Be converted to another type of service integrated within other modules

Service Requests Module

These are typically requests requiring a supervisor's approval for resources and or access to resources. The module should be to:

- Can route to requestors supervisor or other designees.
- Allow routing for multiple approvals of the same request

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- Can route for financial approvers and business approvers
- Can link request to financial accounts or business unit accounts
- Ability to escalate requests to alternative approvers
- Link service request to Service Catalog items
- Can the incident be automatically converted to a service request when necessary
- Can service request be extended to other business units such as HR SR, Facilities SR, Legal SR, Travel SR, General SR, etc.

Problem Management Module

Support that requires greater involvement of IT resources and knowledge and potentially impact multiple people and can require more than 48 hours (about 2 days) to resolve. The module should be to:

- Can merge tickets into one ticket, then automate emails to notify end user
- Can create categories for various types of problems
- Can prioritize problems
- Can document work arounds, separate from solutions
- Can directly create knowledge base of solutions and known errors
- Can transfer problems to change management module, when necessary
- Email Conversation Management (Can all Licensees see email conversations by permissions)
- Can create workflow without coding
- Integration with incident, change management, knowledge, CMDB (Configuration Management Database)

Change Management Module

Upgrades, updates, configuration changes that will potentially impact hardware and/or software changes often requiring the coordination of IT and vendor time and resources. The module should be to:

- Can use workflow or non-workflow (status Checks) in change management
- Can create an Announcement Calendar for future changes
- Can manage the deployment of hardware
- Can Manage the deployment of software
- Can incorporate ITIL best practices
- Has release management workflow capabilities
- Has an audit trail of changes
- Maintains a historical record of system and software changes
- Graphical workflow engine, allowing the modeling of processes and their validation
- Automatic notifications, communications, and real-time status updates
- Change Management scheduler and calendar
- Wizards to alert of competing or conflicting scheduled changes
- Can contain scope of work for change management with modeling (Current and Future States)
- Ability to establish risk ratings for changes
- Ability to accept or reject proposed changes
- Ability to record the impact of changes
- Establish approval process involving stake holders when appropriate
- Ability to implement on-boarding and off-boarding
- Seamless integration between Incident, Problem and Change Management and CMDB

Service Catalog Module

A developed module of categorized services that the end user community can choose from without requiring the end user to provide extensive explanations. The module should be to:

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- Integration with the CMDB, and association of CIs and services
- Creation of multiple service categories, and association of categories with incident tickets
- Provision services to end users and report on the performance of CIs
- Assess the number of incidents associated with specific services
- Create multiple service categories based upon our organization's needs
- Associate each service category with an owner or team
- Create a business service view and a technical service view for each item in the service catalog
- Create workflows for each service category
- Incorporate service-specific SLAs
- Incorporate service-specific costs where applicable

Asset Management Module

A means of tracking the life cycle of valued intelligent hardware devices and software licensed assets at the end user and network level. The module should be to:

- Associate Inventory Management with Unit cost and Account/Budget Centers
- Track OS vs Non-OS Devices (TCPIP)
- Provide Network Scanning Tool
- Track Software License Compliance
- Track Utilization License
- Link AD to user inventory profile
- Inventory Agent is placed on each device with an operating system
- Software Release Management
- Integrate with SCCM
- Active Directory Integration

Knowledge Base Module

A means of developing technical and non-technical articles based on support resolutions and history. The module should be to:

- Authentication to the portal can be done with LDAP (Lightweight Directory Access Protocol), Google Apps, and Office 365
- The Self-Service portal provides access for system messages from the Service Desk staff
- Includes customizable viewing rights for Service Catalogues entries, as well as Knowledge Base categories and specific articles
- Can provide the real time delivery of “best fit” Knowledge Base articles during ticket creation
- Knowledge Base articles fully support embedded video, embedded images, and rich text formatting
- Knowledge Base articles can be rated by the users to determine how effective they are. Rating scores can also factor into built in Gamification features
- When a Knowledge Base “solves” a request, that information is tracked and can be reported on
- Service Desk agents can select portions of an existing ticket and publish them directly to the Knowledge Base
- Can built in responsive UI means that users can access the Self-Service Portal and the Knowledge Base directly from a mobile browser - no need to download a separate app!
- Can have multiple Knowledge bases (Technical and non-Technical)
- No coding required to change forms
- Role and permission via more than one knowledge base
- Setup categories (network, printer, etc...) with access by permissions
- Prompt user to use KB before incident ticketing
- Self-service portal notification of general issue

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- Access Request Workflow
- User Sentiment Capture
- Self-service portal with self-service catalog permission base must be maintained
- Production and Test Environment

Survey Module

A feedback tool for ascertaining information about IT and non-IT issues. The module should be to:

Dashboard Module - The module should be to:

- Provides some level of performance analytics for various metrics.
- Ability to customize the dashboard to track metrics import to DASNY
- Ability to produce visual charts and graphs
- Ability to track data points defined by our helpdesk manager
- Ability to run dashboard on any mobile device
- Ticket tracking with overviews and statuses
- Customer satisfaction reporting
- Agent performance tracking
- Ability to create multiple dashboards
- Time based reporting
- Provide gamification reporting
- Provide KPI reporting and other analytics

Access Management Module

Requirements will be developed as implementation of the Salesforce ITS helpdesk solution is progressing.