



ADDENDUM NO.: 1

IFB or RFP NO.: 734

Description: Salesforce Licenses &
Implementation

Project: DASNY Information Services

Bid Opening Date: October 3, 2022 at 2:30PM

Specifics of the Addendum: Answer questions received during the RFI period.

1. Q: Under "Incident Management Module", are there further details on having a graphical forms designer?
A: All the forms used in the system for each module should allow DASNY staff to graphically design and re-design forms graphically and then allow DASNY to test those forms in an environment that will not affect our production environment, until we approve those forms for publication.
2. Q: Under "Service Requests Module", are there more details about the specific routing rules?
A: DASNY expects the routing capability to be flexible and modifiable through using some type of graphical "Workflow" tool.
3. Q: Does the client have an in-house Repository system that needs to be used?
A: DASNY's backend repository is SQL. However, we are not requiring use of this repository. We do expect that DASNY will be able to move data using APIs from your system to any of our systems that we deem necessary.
4. Q: Does DASNY already have a pipeline/automation server for deployments reading repositories for deployment?
A: For on-premises solution deployments, yes DASNY does have "Pipeline/Automation servers" for deployments.
5. Q: Any specific project hard deadline(s)?
A: Strongly desired implementation be completed by 12/31/2022.
6. Q: Any System/official audit authority that stands as a Deployment Validation actor? (Ex: a sprint content is being validated in a UAT Phase: another actor needs to validate the content changed before going to Prod?)
A: Yes. We will have a DASNY project lead team and sign-off on all aspects of the implementation of this project.

7. Q: Is the Azure Directory SSO Auth part of the project?
A: Yes. DASNY currently uses Microsoft Active Directory FS. "Azure Directory SSO Auth" will be configured by DASNY for use with your solution.
8. Q: Any high-level network/proxy/security considerations we need to know for the systems to integrate?
A: Security is of the highest level of concern for any system or application deployment at DASNY. We have our internal network and security personnel who will provide any details needed to assist in the secure implement of this system. We have four DASNY office locations (Albany, NYC, Buffalo, and Rochester) and dozens of project field site locations that must have secure network access to the proposed solution.
9. Q: Any use of a Marketing Automation System? (Some email use cases are in the list but maybe a dedicated Marketing System is intended to be used for mass campaigns etc.)
A: Our "mass e-mail campaigns" would be limited to DASNY staff and other personnel. We would give access to our helpdesk solution, at this point and time. If there is a component of your proposed helpdesk solution that will enhance or improve the functionality of the ITS Helpdesk, and you believe there is a positive cost benefit, as an option you can propose it.
10. Q: What are the detailed evaluation criteria?
A: The basis for award is "GRAND TOTAL" lump sum price. Bidder shall be responsible for the complete scope of work at the "GRAND TOTAL" lump sum price. DASNY reserves the right to award a procurement and issue a Purchase Order, on the basis of the lowest bid for each item set forth in this Notice and Information for Bidders, on the basis of the proposal judged to be the "best value".
11. Q: What is included in the Carahsoft SKUs?
A: Carahsoft will 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. Salesforce Shield (30 Licenses). Carahsoft will 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 License)
12. Q: Do we have to be on the Carahsoft OGS contract (PM68178) to respond?
A: No.
13. Q: Is Carahsoft eligible to respond?
A: This is a discretionary purchase. This opportunity is intended for small businesses, as defined pursuant to Article 15-A of the New York State Executive law, and MWBE's certified pursuant to Article 15-A and, if applicable, businesses selling goods or technology that are recycled manufactured.
14. Q: Are offshore resources allowed?
A: Yes.
15. Q: Do we need to provide a formal SOW for professional services?
A: Yes.

16. Q: Is there an CTI / IVR requirement?

A: DASNY is not running a call center, so IVR is not necessary. However, we could integrate our helpdesk solution with CTI technology. We have a low volume of phone calls into our helpdesk.

17. Q: What is the existing telephony solution/vendor?

A: AVAYA.

18. Q: What is the monthly and annual ticket volume?

A: Range 275-325/month

19. Q: How many different call types? Can you provide ticket volume by call type?

A: Most of the tickets will come through the ticketing system that we anticipate will be part of the solution. Some tickets will come through email, integrated with the solution, far fewer tickets are by phone, but ticket phone volumes may change since we have deployed all our staff with cell phones for remote work from home and in the field. Incidents ticketing is the most significant volume.

20. Q: Do you expect to have ticket routing and assignment – say by call type or by some other business rule(s), perhaps via queues by specialist?

A: Yes.

21. Q: Re: Reporting, will platforms such as Tableau and extended capabilities be considered or desired?

A: You are free to recommend any reporting solution. DASNY currently uses Microsoft Power BI for reporting. We have used Crystal Reports as well.

22. Q: Are there any requirements for Chat or Chat Bots?

A: You are encouraged to recommend chat or chat bots as part of your solution.

23. Q: Is there an existing middleware platform?

A: SQL Server is DASNY's database middleware platform. We have several application servers running on premise.

24. Q: Can you please list the number and type of integrations? 1-way or 2-way; real time, near real time, or batch?

A: Any integration will be done using APIs for applications like Active Directory, Ultipro, MS SCCM, and JD Edwards. 1-way integration in most cases.

25. Q: Are there Data Conversion/Data Migration requirements? If so, what objects and expected data volume?

A: DASNY has not determined to what extent we will be converting any data from our existing ChangeGear helpdesk system, if at all. We use Microsoft's SCCM product, and we expect some data to come from that system.

26. Q: Can you further describe your mobile requirements?

A: DASNY expects that our employees will be able to create and manage their incident and service requests from their phones - View the status of their requests; communicate with the helpdesk and support teams working on their requests.

27. Q: Will all your assets be loaded into the system, or will they only be added as needed?
A: Some assets may be loaded into the system during the initial implementation, but we expect to add other assets over time. Computers and cellphone devices are likely first candidates.
28. Q: If loaded, what is the count for number of assets?
A: Initially between 500-1000 assets.
29. Q: Will licenses be responded to and procured separately from implementation services?
A: No, both the licenses and implementation services will be purchased together from one bidder.
30. Q: Is DASNY expecting two requests for quotes? One from Salesforce and one from an Implementation services partner?
A: No, the licenses and Implementation should be quoted as part of the complete scope of work.
31. Q: How many Support Users will this system be expected to support (including support representatives, management, and leadership)?
A: 30
32. Q: Do you have a Master Data Management System that your Change Management Database connects to?
A: Our in-house data management system is SQL Database Servers. No, they are not connected to any change management system. We use ChangeGear, as cloud system to manage aspects of our change management activity.
33. Q: What types of devices will need to utilize this system? Mobile, Tablet, Laptop, Desktop, etc.
A: Mobile, Tablet, Laptop, and Desktop.
34. Q: How many groups of Support Representatives will the system be supporting?
A: Approximately 29 groups. However, that number could change. This is To Be Determined and redesigned in our new system.
35. Q: On average, how many Service Level Agreement Rules do you have per Support Representative group?
A: Our service Level Agreement rules are poorly defined today. This is To Be Determined and redesigned in our new system.
36. Q: How many tiers do you have in your SLA's?
A: Approximately 4. However, that number could change. This is To Be Determined and redesigned in our new system.
37. Q: Is this a request for a catalogue of common services to identify on incidents, cases, etc.? Do these services have key data points that need to be summarized, such as expenses per service per year or number of incidents per month?
A: Yes.

38. Q: Once the form has been built via the designer, is it expected that it will be available for a Service Rep or a Customer?
A: There are likely to be forms for both the Rep and the Customer, depending on the service module, with different views of the information needed. Note sharing to and from the customers and the support rep should be available in the system, visible to both. Additionally, private notes created by the rep should be visible to other support staff.
39. Q: Is the point being made that these business units will be migrated into Salesforce with their own support processes, SLAs, representatives. OR Is the point being made that users will have access to the same support process to provide input for case remediation, providing different context and perspective per business unit?
A: We look for input from business units and end users when deploying any hardware, for scheduling and other coordination activities. End users should have access to the same support process, based on context and perspective.
40. Q: Do you currently have a parts/hardware catalogue that you would be looking to make available in the system to track upgrades and installations against?
A: DASNY has parts/hardware data for items in a couple of disparate systems. Some parts/hardware are not in any system at all. Our goal is to have one system that can manage all the assets (Hardware and Software) in one place. The system should have the ability to manage the entire life cycle of our assets.
41. Q: Are you looking to automate onboarding by integrating Salesforce and Azure AD
A: Yes.
42. Q: How many categories/sub-categories do you have for Incidents/Service Requests, etc.?
A: Approximately 12 categories /125 sub-categories. This is To Be Determined and redesigned in our new system.
43. Q: Are most of your incidents/SR's are of type FAQs/First Call resolutions, or you require your agents to deep dive into each issue and resolve them?
A: Any first calls, if it is within the support person's expertise or knowledge, are expected to address the issue. If it requires more involvement, the incident is routed to the correct person or team. DASNY's goal is to develop best practices in support and to create quality knowledge bases for both end users and support users to increase productivity for all end users.
44. Q: How many KB articles you currently have, are you planning to move that data from existing system to Salesforce?
A: There are no significant knowledge articles worth moving.
45. Q: Majority of the requirements are listed as product capabilities/features and can be met with Salesforce. Can you please provide more details on the types of requests, call intake, allocation and escalation processes, Business processes, etc. This would help in current sizing of the project.
A: DASNY has 275-325 incident calls per month for IT support. Most of the incidents are submitted through our current system. A small fraction is submitted by email or phone calls, at which time the support staff will request that the end user create an incident ticket, or the support staff will create an incident ticket on behave of the end user.

46. Q: Can you provide the type of users who would be reporting these issues?

A: Today issues are submitted by end users (general DASNY employees).

47. Q: Can you please provide details on the request types for these units. HR SR, Facilities SR, Legal SR, Travel SR, General SR?

A: These are future areas where DASNY hopes to expand in the helpdesk area.

48. Q: Do you have requirements for Document management, please provide detail requirements?

A: No, DASNY does not have requirements for document management. We will look to the solution to provide guidance in this area.

All other terms and conditions of the original Invitation for Bids shall remain the same.