**ADDENDUM 4**

DATE: March 27, 2020

PROJECT: ServiceNow Implementation Partner

RFP NO: 744-R2011

OWNER: The University of Texas Health Science Center at Houston

TO: Prospective Proposers

This Addendum forms part of and modifies Proposal Documents dated, March 9, 2020, with amendments and additions noted below. The following are the University’s responses to bidders’ questions received by the Question Deadline (**Section 2.2)** on March 23, 2020.

1. Are your customers internal university employees and contractors only? If not, who else will be submitting tickets or requesting services via ServiceNow applications?

Our Customers are currently all university employees, sponsored guests, or students but could expand for some EPIC functionality to assist with MyChart Mobile App password resets for patients.

1. Do you have a ServiceNow support team (owner, administrator, developer, etc.)?

We have a full-time administrator starting in April

1. What ServiceNow release are your instances on (Madrid, New York, Orlando)?

New York

1. How many instances do you have (development, test, sandbox, production)?

4 instances (prod, dev, dev2, test)

1. Which groups and/or departments will be working tickets inside of ServiceNow (IT, infrastructure, etc.)? If any non-IT groups please explain.

|  |
| --- |
| These are the top group levels, there are subgroups under these areas. |
| PeopleSoft-FMS/HCM/Campus Technical/DBA AdminsHR Information SystemsGECB Support / EPICHelpDesk/IT TrainingIdentity Management /IT SecuritySBMI RedCap SupportSBMI-SupportSOD Educational Technology/Web SupportSOD EHR SupportUT PayrollWeb Comm teamUniversity IT Infrastructure | AHA Reporting (Analytics & Reporting)Allscripts/EPICApplication Support-HCPCClinical TechnologyBudget & Financial ReportingAthena SupportCommunication TechnologyData Center OperationsDesktop Service HCPCDesktop Service/UXSUniversity Enterprise Applications |

1. What are your training requirements?

Audience: Fulfillers, user/requester/employee, corporate trainers

Sessions: at least 1 per fulfiller group.

Sessions: train the trainer sessions
Delivery: Live hands-on sessions with documentation and quick reference guides provided.

1. What kind of reports do you require?
	1. Do you have any examples of custom reports that need to be recreated in SN?

We currently do not have custom reports, but we are looking at having them in the future.

* 1. Do you have new or existing Audit or Compliance requirements that you need to meet?

We currently do not have audit or compliance requirements in scope for this project

1. How many dashboards are you require (one for Service Desk, one for Infrastructure, etc.)?

We will need at least one per business unit and one overall dashboard

* 1. And what types of data needs to be displayed for each?

Statistics for open items, close time, fulfiller statistics.

1. Do you have defined processes? If so, can you provide documentation (Visio, PDF, etc.)?

We have defined processes, but do not have workflow documentation for them.

1. Do you have a Major Incident Process? If so, what is the process?

Our current major incident process is managed with email and a postmortem report

1. What are the intake methods for an Incident from the end user? (phone, email, portal...etc.)

Phone, Email and portal

1. Are any Incidents automatically created from Inbound Emails or events/alerts?

Emails sent to a specific address by users, other than that nothing is automated.

1. Is there anything you are not doing today that you need ServiceNow to do on Day 1?

Outside of requirements for EPIC project, unknown at this point.

1. Is Problem Management in scope?

Yes

1. Do you currently perform RCA (root cause analysis)? If so, what is the process?
	1. Are you creating problems from incidents?

Yes
b. Are you creating changes from problems?

Yes

1. What kinds of changes are you doing today (Standard, Normal, Emergency, Urgent, etc.)?

Standard and Emergency

* 1. What are some of the use cases?

Standard changes are planned ahead of time, but emergency changes are done to correct a problem.

1. How often do you hold CAB (Change Advisory Board)?

Infrastructure and Clinical Technology hold separate weekly meetings

1. Do you also have an eCAB for emergency changes?

Currently no

1. Are you familiar with the CAB Workbench feature in SN for CAB meeting assistance? If so, is this a Day 1 requirement?

This is not a requirement for Day 1

1. What types of requests do you normally fulfill?
Large volume of login/account tickets, application issues/errors, training requests, connectivity issues
2. Do you have defined processes for each type of request? If so, can you provide documentation (Visio, PDF, etc.)?

We do have defined processes, but we do not have Visio workflows available.

1. How many Service Catalog Items (different request types) will you need created as part of this project?

Here is our top 10 list of requests. We will also have an additional 20 – 30 that we will require for EPIC. (Dictionary requests listed below are related to our current Allscripts Electronic Health Record application) 2019 numbers below.



1. Are one of these items Onboarding (new user) or Offboarding (termination) requests?
	1. If so, please provide documentation that reflects the process and overall complexity.

No, HR functions are out of scope for this project

1. If there are a high-number of catalog items, are you interested in a “teach-to-fish” method so you can self-sufficiently continue to build out your Service Catalog?

Yes

1. What services will you provide to users via the Portal?

Enter incidents, service requests, and self-service tracking the status of submissions.

1. What type of branding requirements are there?
	1. Are there strict branding requirements? If so, please submit your branding guidelines.

<https://www.uth.edu/brand-standards/index.htm>

* 1. Will branding differ depending on the user?

Yes

* 1. Will you need forums available on the Portal?

No

1. Do you anticipate any custom web development?

Not at this time.

1. Is Knowledge Management in scope? If Service Portal is in the scope of the project, InSource recommends the implementation of at least one external Knowledge Base for user self-service to drive Portal traffic and adoption. If in-scope…

Yes, internal. Ability to review similar resolved incidents.

1. Will you need internal and external knowledge bases?

Yes

* 1. How many knowledge bases will you need?

Two, one internal and one public facing

* 1. Do you have knowledge articles that need to be migrated? If so, how many? And from what types of systems?

None

* 1. Is an export possible for migration? If not, what type of integration is needed?

N/A

1. What the business’ objectives for SACM (Service Asset & Configuration Management)?

We do not currently have an objective

* 1. What is the current process? Can you provide documentation?

We do not have a current process

1. What system are Assets currently managed with?

Internally Developed IIS/SQL application and FMS

1. What is the desired future state? Documentation? Or will InSource need to help develop ITAM (IT Asset Mangement) processes?

Documentation and tracking.

1. Who in the business owns ITAM? Is there a dedicated group?

Captial assets and Desktop support

1. Will the Asset Life Cycle begin with a Request? Procurement? Or Discovery?

Procurement.

1. Is there a CMDB?

Not a singular CMDB. We have multiple SCCM environments across the University

* 1. If so, how is the CMDB populated (SN Discovery, SCCM, etc.)?
	2. If not, how will assets be populated?

Currently it is a manual process, but we would like to have our asset creation start with our procurement application and then create the assets in SN.

1. Will Hardware Assets, Software Assets, or both need to be managed?

Software assets are not in scope for this project

1. Will Contracts need to be managed?

Not in scope for this project

1. Total number of hardware devices?

Currently there are 40,000 managed assets in our inventory system

1. Will non-networked devices need to be managed? Does this include fixed assets?

Yes. We will want to inventory non-networked devices. We will not inventory things like tables or other fixed assets.

1. Is Inventory management needed? If so, how many stockrooms are there?

As it relates to a pool of assets on hand to pull from, there are areas that have some stock that they pull from for deployments. For example, one of our desktop support areas has assets ready to go in case they need to deploy it to a user. Currently there is no ‘stockroom’ type of setup where items are scanned in and then scanned out.

1. Are auto-restocking rules required?

This is not in scope for this project

1. Is asset tracking or barcodes in use today? Is this a future state requirement?

We currently have asset tags with numbers across the university, but not all of them have bar codes on them. Down the road it would be good to be able to utilize those barcodes

1. Are there any non-standard workflows not a part of the ITAM framework (i.e. loaners)?

Yes, we have loaners

1. Is there a disposal process for depreciation?

There are two current processes.

*Capital Assets* – these are decommissioned and sent to our internal surplus department for handling. These systems have been DOD wiped prior to going to surplus.

*Leased Assets* – these are decommissioned and sent off to the Leasing company for DOD wiping.

1. Does the business need to calculate total cost of ownership?

Eventually yes, not at Day 1 of this project

1. Is there a need for cost allocation or chargebacks to cost centers?

Yes.

1. InSource follows best practices of implementing a CMDB to support the other ITIL processes, including Asset Management. Are you performing Configuration Management today?

We have multiple SCCM environments, and a JAMF environment. We want to consolidate into one CMDB

1. Is there a named Configuration Management Owner?

Yes

1. How do you track your assets?

We have a manual process to enter and track assets

1. Is there a concept of a CI vs an asset in your organization today?

No

1. Do you have policies that govern your CIs/Assets/ CMDB?
	1. If no, do you need advisory services to help define your configuration management process and governance? IE; SOX controls

We must follow configurations that support our HiPAA, FERPA and PHI legal requirements and UT System mandates

1. From an infrastructure perspective, do you have a need to track all of the devices in your data centers?

Yes.

1. How many data centers/colocations do you manage?

Four

1. Does your company have an understanding of Business Services? If so, how many Business Services are currently defined?

We do not have an understanding of Business Services

* 1. Are your Business Services tied to Service Offerings/SLAs?
	2. Are there existing policies that govern your Business Services?
	3. Please provide an example of your most critical Business Service and any additional detail around it.
1. What processes use CIs information (incident, change, etc.)?

Currently no processes, so we are looking for guidance from our implementation partner

1. How many user locations with devices?

Over 200 across Texas

1. How many IP scopes?

Three

1. How are you populating the CMDB? Manually creating/updating, Spreadsheets, External CMDB

Manual asset management and separate SCCM and Jamf environments

1. Discovery-like tools (i.e.; SCCM, Atrium etc.)?

SCCM, Jamf (Casper)

1. Do you need SN Discovery? Do you expect to use SN Discovery along with another integration?

Discovery and Service mapping is not in scope for this project. Only ITSM is in scope for this project.

1. Do you have a credential management system (i.e. Thycotic, CyberArk) that we would need to integrate with for Discovery?

Discovery is out of scope for this project

1. Will you need any business services mapped? If so, which ones?

Service Mapping is out of scope for this project

1. Do you have a need to establish relationships?

No

1. Will you need to manage Events? If so, how?

Not within this project.

1. Please list your current Event Monitoring tools

Splunk, Solarwinds

1. Are there any externally hosted services you want to include in Configuration Management?

We are not sure at this time

1. Are you using an identity provider? If so, what?

We are our own identity provider using our Identity Management solution.

1. Are you using ADFS for user account creation & management?

Accounts are created and managed with our Sailpoint Identity Management solution

1. Are there any other systems that will provide user data? If so, what?

Sailpoint Identity Management and e-directory

1. What user data needs to be populated within SN (Name, Manager, Location, Department)?

Username, department name, title, location, phone number, account status, UUID (unique user id it is different than the username), email address, Organizational Unit, UTHealth Data source and Dept ID and manager name.

1. Will you be using ADFS for SSO/authentication?

ADFS with SAML2.0

1. If not, what SSO will be used?

We will use ADFS with SAML2.0

1. Are there any other external systems that will need to be integrated to support ITSM?

Coupa – Unidirectional integration

HCM – Workflow Only

FMS – Currently we have Bidirectional integration with our asset management system and would like something similar with Service Now

EPIC – Workflows only

Campus Solutions – Workflows only

1. What applications/processes/functions will this integration support?

Incident, Request and Asset management

1. What will be the triggers for the integration?

Coupa could trigger asset creation

EPIC could trigger incidents

1. What data will need to be transmitted to/from SN?

If an asset is procured with Coupa, we would want a transmittal into SN that would create the asset.

Once an asset is decommissioned (sent to surplus or returned to the leasing company or lost/stolen) we may want to send that information into FMS.

1. How many transactions (post, get, etc.)?

This is unknown

1. Will the communication need to be bidirectional or unidirectional?

This is unknown

1. What will the integration interface be (SOAP, REST, JDBC, OBDC, ServiceNow or Vendor app, etc.)?

This is unknown

1. Is a CTI (Computer Telephony Integration) needed?

CTI is not part of this project, but we are open to learn more about it

* 1. What telephony system are you using? What type of system is it (on premise, cloud, etc.)?
	2. What will the CTI need to support (ITSM, CSM, other applications)?
	3. What functions will be needed (inbound calls, outbound dialing, call transfers, on hold, mute, setting availability status, log call history in SN record)?
	4. Are there other points of data that need to be documented in the SN record (call ID #, queue or support line origination, etc.)?
1. Will any legacy data need to be migrated from your old ticketing system? If so, what and for whom? (Best practice is to not migrate legacy data into ServiceNow).

No, we will export legacy data for reference only, not for importing into Service Now

* 1. What will you need the data in the new system for (reporting, auditing, reference, etc.)?
	2. Do you need to migrate historical ticket data (closed tickets)?
	3. Do you need to migrate open/active tickets as well?
	4. How many columns of data (data points such as: open date, closed data, user name; priority, etc.)?
	5. Are you expecting any attachments to be migrated as well (screenshots, PDFs, Word, etc.)?
	6. Are you expecting as subcomponents to be migrated as well (child tickets, related ticket information, etc.)?
	7. Is an export possible for migration? If not, what type of integration is needed?
	8. Is there any additional information that will help us understand your requirements?
1. If Contract Management is in scope… How do contracts need to be managed? Full Lifecycle? Starts with Legal? Or just upcoming expiration dates and renewals?

Contract Management is not in scope for this project

* 1. What types of Contracts need to be managed? Ex: Hardware or Software Lease, Maintenance, Purchasing Orders, Warranties, Service, Subscriptions, etc.
	2. Is there a Contract creation system in place already?
	3. Are Contracts managed in a document repository? Or is SN expected to do this?
1. Are you currently using Surveys? If so, how?

Yes, we have satisfaction follow-up surveys that submitters can fill out

* 1. If not, do you need to track customer satisfaction surveys?

Yes

1. How many survey questions will be needed?

This number hasn’t been defined, but up to 10 questions. We also need to have different surveys for different business units.

1. What will trigger the surveys (closed incidents/cases only)?

Currently only closing tickets triggers the survey, but we would be open to other use cases.

1. What processes/applications do you need to track time for?

HR is not in scope for this project

* 1. Is there any approval process for time cards?
	2. Is there any automatic time cards creation process?
	3. Do you use any rates (cost) while creating time cards which then on approval creates an expense line?
	4. What kind of reports do you generate using the time cards information?
	5. Do you track time weekly/monthly?
	6. What are the maximum hours per day and per week?
1. The RFP has a question on experience of importing asset records from a legacy system. What is UTH’s current legacy asset management system? Also, for ITSM, will there be expectations to import legacy ticket information into ServiceNow for this implementation?

Assets are currently tracked in an internally developed IIS/SQL application and our FMS system.

We will not be importing legacy ticket information

1. ServiceNow has capability for both hardware asset and software asset management. Are both in scope for this RFP?

Hardware assets are in scope, software assets are not in scope at this time.

1. For Hardware Asset Management, we typically recommend a phased approach for different asset classes, (e.g., laptops, desktops, mobile devices, infrastructure asset such as servers, network gears, etc). Is there any prioritized asset classes that UTH intends to implement in phase 1?

Desktops, Printers, Laptops, Mobile devices

1. For Hardware Asset Management, how does the asset records get imported into the database today? Is there any integrations or automated discovery tools in place to populate such data? For this implementation, what is UTH’s expectation for asset records population (e.g., automated vs manual import)

Currently there is no integration, assets are added manually. We would like the asset creation to come from our procurement application Coupa, and then We would like SCCM and JAMF to feed updated information into ServiceNow regarding the current state

1. If Software Asset Management is in scope, has UTH acquired licenses for ServiceNow Software Asset Management professional?

Software management is not in scope for this project.

1. If Software Asset Management is in scope, Alcor typically recommends a phased approach for different software asset entitlements (e.g., Microsoft, Adobe, etc). Does UTH have a prioritized list of software entitlements that it would like to be implemented in this phase of the project?

Software management is not in scope for this project.

1. For UTH, is there a separate Incident and Change Management process to support E.H.R (i.e. EPIC) from the support processes for rest of the environment?

Yes. Currently the clinical change management is separate from infrastructure.

1. For Service Request, we typically recommend a phased approach to roll out different Service Catalog and Request items for the enterprise. Does UTH have priority list of catalog items that they would like to see implemented in the initial phase?

Here is our top 10 list of requests. We will also have an additional 20 – 30 that we will require for EPIC. (Dictionary requests listed below are related to our current Allscripts Electronic Health Record application) 2019 numbers below.



1. Can you provide a ballpark number of the following (if not already in the RFP background):
	1. Number of legacy systems with asset data which will be migrated to ServiceNow?

Two

* 1. Is there an archive process or policy whereby Assets within past 4 years will be imported?

No

* 1. How many assets are managed today? How many are within past 4 years?

2016 – 32,000

2017 – 33,000

2018 – 35,000

2019 – 39,000

2020 – 40,000

* 1. Provide a list of the types of hardware (Classes) that are managed today as asset management: computers, servers, IOS, printers, etc.

Desktop, Laptop, Servers, credit card machines, medical equipment, local and network printers (including label printers), document scanners, tablets (including ipads), monitors, network switches and badge readers.

1. Will this be expanded or reduced with the ServiceNow implementation? Are Cloud resources considered assets?

This will be expanded with ServiceNow. No Cloud resources are not assets.

1. What is the tenant structure? Geographic, company, business unit, department, cost center, etc.

Business Unit

1. In your RFP there is a conflict in due dates for questions. In section 2.2 it reflects a deadline of 2:00 PM March 18th and in section 2.4 it reflects a date of 2:00 PM March 23rd. Which date is the correct date?

March 23rd is the correct date.

1. It appears that the Bidder Pre-Briefing that was scheduled for this morning at 0800 was cancelled. Will this be rescheduled?

We have the questions and answer session avail as a recording.

1. If the Bidder Pre-Briefing is being postponed due to COVID 19, will the due date of the RFP be delayed as well?

No

1. One of the referenced items in the RFP relates to HubZone participation. If a responding company does not have a HubZone partner, will you still consider a potential award, or will respondent be disqualified immediately?

Please refer all questions about HUB and the HUB Subcontracting Plan to Shaun McGowan. His information can be found in the RFP document.

1. Can you please confirm your current subscription disposition? i.e. What is UTHSC licensed to deploy?

ITSM Professional with 310 Fulfiller, 60 Business Stakeholder

1. Does UTHSC anticipate that you own ample entitlements to complete the project without the necessity to increase subscription levels?

This is unknown, we estimated based on our current usage

1. Understanding that there is a requirement to harden your ServiceNow instance to protect HIPAA, FERPA and other confidential data, is there a reason why UTHSC does not reside in ServiceNow's FEDRAMP cloud?

No, this does not apply to us

1. Throughout the RFP there are numerous references to "Assets". It is understood that the majority of Assets to be inventoried will be Information Technology Assets. However, what categories of asset will be inventoried and are any of these assets Biomedical devices?

Yes, we have Biomedical Devices, IT Assets, Treasury assets like Credit Card readers

1. Are all assets to be inventoried network accessible?

No

1. Do any of the “Assets” exist in an automated CMDB and or Inventory platform today? If so, what systems are they?

SCCM for our IT Assets

1. In your reference to integration with Epic, what is the overall goal for UTHSC? Are you wanting the offeror to build an Epic integration? If so, what applications/components are you wanting to integrate with? Data Courier, Help Desk etc?

EPIC relies heavily on Change Management and Incident Management. We are not looking for a direct integration with Epic, but we are looking for workflows and processes that support

For example, Epic has an in-application Help Button that can send an email to create a ticket in service now based on an email listener.

We are also looking for your knowledge of EPIC to help us set up for a successful support model.

1. Will integration be bi-directional or one direction (ie. SN>Epic or SN<Epic)?

There is no true integration, just workflows and processes.

1. Does UTHSC maintain and Interconnect server for API calls into Epic or would the offeror be required to set this up?

We are not looking for API integrations

1. Will UTHSC have EPIC expertise on staff to work collaboratively with our team during integration scenarios?

Yes.

1. Given the recent public health crisis and social distancing, will it now be acceptable for an electronic email submission of the RFP?

No. It is a state requirement that there is a physical submission.

1. When shall we expect answers from UT Health to the questions submitted?

Friday, March 27, 2020

1. UT Health organization:
	1. Are their process owners for each process area?

Yes

* 1. Is there (or will there be) a formal Service Management Office?

Currently there is no SMO

* 1. Is there ITSM governance today at UT Health?

No

* 1. How would you rate UT Health’s process maturity?

Varied.

* 1. Is there staff that focuses on OCM?

There are staff imbedded within the business units that manage the changes

* 1. What roles will the University be providing as part of your implementation project team?

Our Help Desk Manager is our Incident Process owner

Our Asset Manager is our Asset process owner

Change Management has a few process owners

ServiceNow Administrator

* 1. Will the University have a team that is trained/knowledgeable in sustaining the platform after implementation? (Ex. Admins, developers, Platform Owners, Process Owners, etc.)

Yes.

1. What channels will tickets come in from (phone, email, self-service, chat)?

Current tickets are received via self-service, phone, and email.

1. What is your source system for Employee data?

PeopleSoft HCM Is used for employee data.

1. Do you currently have Configuration Item (CI) data stored in an existing system today?
	1. If yes, what is that system?

SCCM and JAMF

* 1. If yes, are you currently leveraging an automated Discovery tool to keep your CMDB up to date?

No

* 1. If yes, do you have relationships defined between these CIs?
	2. If yes, is this CI data in the same system as your Asset Data?
1. Do you plan to import a list of Applications or Business Services to help categorize tickets (incidents, requests, changes)?

Yes.

* 1. If yes, Is there relationships defined between CI's and Business Services?

No

1. What system do you currently have your Hardware Asset data stored in?

Internally developed IIS/SQL application

1. Does the University want to move legacy Hardware Asset data to their new environment, or will this be a live integration?

Moved into new environment.

1. Does the University desire full lifecycle management of Hardware Assets implemented in this phase or just inventory management of Assets?

We will manage requesting new equipment with Coupa, but once the asset is received, we would like Coupa to feed it into Service Now for creation. Once the asset is decommissioned, we will likely want that to feed back to our purchasing system (FMS).

1. What does your current Service Catalog look like currently and what Services are you looking to include in phase 1 of the deployment? How many anticipated catalog items (with complexity - Low/Medium/High)?

EPIC Service Request – High

Current service requests top 5 – High

Current service requests top 6-10 – Medium



1. Does the University want Performance Analytics included for all applications or only specific applications?

Specific applications.

1. What functionality are you looking to leverage from Release Management?

Release management is not in scope for this project

1. Do you have Change processes outside of the baseline workflows (Standard, Normal, and Emergency)?

No.

* 1. If yes, can you give an explanation about these other processes?
1. Are on-site resources required at any time other than for Training?

Due to Covid -19 we are not requiring on-site resources, but would like the option if it is possible later

1. Can you provide a comprehensive list of integrations in-scope for this initial phase (for example: on the pre-proposal conference, it was mentioned that SCCM, Coupa, FMS Capital Asset System, were mentioned however were not referenced in the RFP document)?

These items were mentioned in the statement of work documentation. We would like coupa to feed into SN to create new assets and then we would like SCCM to update those assets. If we update the location or assigned user in Service Now we would be interested in seeing if that could feed back into FMS.

1. For each integration, please provide a use case and how it will integrate with the ServiceNow platform.

Please see #137 for a use case with Coupa and FMS.

1. Outside of ITIL workflows (Incident, Request, Change - specific to EPIC), what additional interaction is required for ServiceNow in relation to the EPIC project?

Incident, Change and Asset management

1. Can you please provide a comprehensive list of all the modules (ex: Incident, Request, Change, etc.) the University would like to implement, specifically for this initial phase versus future phases?

Incident, Change, Asset

1. Who are the stakeholders/personas that will need to interact with the Service Portal? What is the ideal user experience?

Employees, designated guests, students, and patients

1. Can you please define which section of the pricing table in Section 6.2 you would like the vendor to include the components that are not specifically aligned to the pricing tables sections of Incident/Request, Change or Asset? For example, Service Portal, Release, integrations, Core configuration, etc.

Please provide the pricing for those components as best to the format of the pricing table as possible. If not possible, please provide the pricing

1. What type of Training/Documentation adheres to the way your organization learns best?

Live hands-on training with documentation and reference sheets provided.

1. Section 6, Deliverables 1.C: “Change & Release Management with limited (CMDB)”Is the desire here for both Change Management and the Release Management applications to be configured and implemented?

Release management is out of scope for this project

1. Section 6, Deliverables 1.a: “IT Request”: Has a number of processes/workflow been determined for desired offerings at go-live?

IT has determined we will need 40 request offerings to be ready at go-live. These offerings are made up of 20 from our existing catalog and 20 catalog requests for EPIC.

1. For UTHSC’s current IT systems, can an export of active tickets be provided in excel format for transfer to ServiceNow by UTHSC staff?

We are not transferring any active tickets to Service Now

1. How many active IT task records are there currently? (to baseline expectations for transfer)

We are not migrating active tickets

1. Does UTHSC have a current CMDB and/or Asset database?

We have an internal/manual asset management system

1. Does UTHSC have a centralized Asset Management Process?

We have an internal/manual asset management system

1. Does UTHSC have a documented Network Map?

Yes. Network specific details will be provided to the selected vendor as needed or required. UTHealth does not believe this information is necessary to bid the solution.

1. Does UTHSC have any endpoint configuration management tools configured for tracking endpoint user devices?

SCCM and JAMF

1. How many enterprise applications / application services does UTHSC have? (please estimate)

200

1. Please provide an estimated infrastructure count:
	1. Servers (virtual & physical)?

2500+

* 1. Network Gear? (switches/routers/etc)

600+

* 1. End User Computing Devices? (laptops/desktops)

18000

1. What is the current headcount of UTHSC IT department?

500+

* 1. How many teams/departments exist in IT?

4 major departments: (1) Infrastructure, (2) User Experience & Support, (3) Administrative & Academic Technology, (4) Clinical Technology. There are a few other smaller departments.

1. How many Change Approval Boards exist currently?

Two

1. How many users will be trained as ServiceNow Admins? Developers?

Unknown at this time.

1. How many different change approval types are desired at go-live?

Three

1. Is there an estimated number of change templates desired at go-live?

Three. Go live will include 3 distinct change management boards. They include infrastructure, revenue cycle, and clinical technology. Each group has its own members and specific data elements they want to be included in their change templates.

1. Does UTHSC have an IT Service Management team consisting of dedicated roles based on ITIL processes? (ex: Incident Manager, Change Manager, etc.)

No

1. Active Directory:
	1. Single Domain?

No, we have parent and child domains

* 1. Hosted on-prem, cloud, or hybrid?

On premise AD, Service Now will be hosted

* 1. Does it contain manager and team information for users?

This is currently in our identity management system, not in AD

1. At the vendor conference there was discussion regarding the integration with Epic and Coupa. Can you confirm that Epic and Coupa integrations are required for this project?

We would like our new asset creation to start with an event from coupa

1. What is UTHealth’s policy regarding protected health information (PHI) found in ticket data?

We discourage the entry of the data.

1. Does FMS integration include fixed assets?

No, it is IT assets over a specific dollar amount

1. How many different IT organizations exist across the different schools?

Seven total across the organization.

1. Do the various schools have their own distinct Identity Management, Single Sign On, Active Directory, and other systems that are not central to UTHealth which might need to be integrated with ServiceNow during this project?

UTHealth has one Identity Management/Single Sign On solution.

1. Could you please state the difference in the language in section 5.4.2 pertaining to Asset Management.

These are the same question.

* 1. Question 1 “Do you deliver a process for importing data from a legacy system?”
	2. Question 4. “Do you deliver a process for importing data from a legacy system? If not, how is this accomplished?”
1. How do you normally get the pulse of employees when major changes take place?

We let them know of the changes coming, and then ask for feedback as we are implementing

1. In addition to the training activities specified, is UT Health looking for a more robust Organizational Change Management program?

We would like some guidance on how to create this, but it really isn’t in the scope of this project

* 1. Are there specific types of organizational change management activities that have worked well for UTH in the past?

We recently restructured our IT org chart with great success

1. Is UTH looking for a comprehensive Organizational Change Strategy, Communications Plan and vendor execution due to the magnitude of this change to the organization?

No

1. How many and how large are the teams / groups that need to be trained on the solution?

5 Groups (Asset Management, Service Desk Employees, Trainers, IT Users). Groups range in size from 2 – 30.

1. How many ServiceNow Admins does UTH plan to in place to support this solution? Note it would be more beneficial to UTH if these individuals are already Certified Sys Admins and is highly recommended prior to kickoff.

One system admin starting work in April.

1. What are UTH's integration needs at this time for asset tools or others (outside of ADFS)? If so, please provide the names of the applications, purpose of integration, uni / bi-directional, versions, on prem / in cloud, etc. pg. 13 section 5.4.2.CM.5 also refers to a potential tie to an asset database

Coupa for asset creation, may also want asset decommission data sent from SN to Coupa (that would be bidirectional)

SCCM for asset updating (uni directional)

1. In terms of the services UTH provides that will be able to be requested through the portal, does UTH have any idea on the # of services to be / that are provided and how complex the manual workflows are currently in terms of # of touchpoints, notifications, approvals, etc.? Approximations are sufficient.

IT has determined we will need 40 request offerings to be ready at go-live. These offerings are made up of 20 from our existing catalog and 20 catalog requests for EPIC Touchpoints vary by request, but all requests are sent to the team that supports the service and if necessary, any sub-teams. Notifications are generated to the user (submitted, approved, fulfilled), teams and team members. Workflows can either be cascading or independent based on the type of the request with approval points as needed.

1. Can UTH please elaborate on the Vendor Deliverable, "All necessary ServiceNow platform foundations"?

We would like our vendor to have knowledge of The ServiceNow NOW Platform and provide some future state guidance on utilizing its functionality on items other than CMBD and Analytics.

1. How many existing systems is UTH expecting historical data to be migrated from? Is there any idea on the type (asset only?) and volume of data needed to be migrated?

Asset Only, 40000 current assets

1. Can UTH please clarify what they are looking for in terms of KPIs related to the self-service portal? Assumption is that UTH wants to capture stats on usage / etc. not necessarily present KPIs on the portal itself to end users. Is this a correct assumption?

Correct

1. Assuming UTH is referring to EPIC the software, is this accurate? <https://www.epic.com/>

Yes. [www.epic.com](http://www.epic.com)

1. Is integrating with EPIC in scope for this engagement? If so, what is the purpose of this integration (e.g., date types)? Is EPIC on premise or SaaS? What version are you using? Would the integration need to be bi-directional?

Epic Electronic Health Record application. EPIC highly utilizes SN incident/request/change management and we would like some assistance in setting this up. We do have some staff with SN and Epic experience, but we would like to know if there are any best practices and workflows that the implementation partner can assist us with.

1. Can UTH please elaborate on what is meant by Change & Release management "with limited (CMDB)"?

Currently, we do not have a true CMDB. We have a manual asset management process. With our SN licensing we get 250 Discovery licenses for use with CMDB, but this is not the focus of this project

1. Is UTH expecting ServiceNow's Release Management funcitonalities to be in scope of this engagement (only mentioned here)? Best practice would suggest to let Change Mgmt. processes mature prior to implementing Release Mgmt.

Release management is not in scope for this project

1. Is the extent of CMDB work within this engagement only to create configuration items (CI's) for the hardware assets that will be imported into ServiceNow? If not can UTH expand on their CMDB requirements for this engagement?

We want to import our current assets and develop how Coupa will feed into new asset creation

1. Is integrating with Splunk in scope for this engagement? Assumption is no, is that accurate? If in scope, is this for the purpose of creating HW CIs in the CMDB?

Splunk integration is out of scope for this project

1. Does UTH have an expected duration of vendor provided support post go-live?

A minimum of 3 weeks to ensure time to find issues post go-live plus any time to correct issues.

1. What are the specific data migration requirements for this initial phase? What systems and what is the type of data (e.g., incidents) that needs to be migrated? What is the volume? Vendor will provide a template for any required data loads into SN (.xlsx, .csv, etc.). pg. 13 section 5.4.2.AM.1 refers to this

We are only looking at migrating asset data currently about 40,000 assets.

1. Can UTH please elaborate on their multi-tenancy change management needs? Will different teams / users need to be restricted in terms of what data they see within the ServiceNow console (UI not portal)?

We have differences for focus on change management. Infrastructure, Clinical applications, internal applications, etc. Users may or may not be restricted from seeing others changes. But they don’t want their views cluttered up. We also want the ability to see all the changes to understand the whole picture of what is going on.

1. Can UTH please elaborate on what exactly is meant by creating templates and cloning change board requests? What is UTH's definition of a change board?

We have some standard change types that are submitted to our change board for approval that are repetitive, and we are looking for a way to make that process more efficient. In our home-grown CB system, we can look at a previous change request and clone it and then change the pertinent data, A good example would be Windows Server Patching. We list out the servers that are going to be patched during an outage, and we don’t want to reenter hundreds of server names every month.

1. Can UTH please describe the "multiple tenants" involved in this implementation and provide an example of a use case around security structures required?

Currently we have different business units across the University. They have their own change management, incident management, and asset management strategies. Part of this implementation will involve aligning those different business units into one cohesive strategy.

1. Is UTH purchasing their own instances from ServiceNow? If so, are the instances going to be domain separated? If not, are UTH's instances going to be hosted by a 3rd party MSP with multi-tenancy?

We have purchased our own instances from Service Now. We have 4 instances (prod, dev, dev2, test)

1. Does UTH have any Computer Telephony Integration that needs to be connected with ServiceNow for their Service Desk? Please clarify if a CTI integration is in scope of this effort.

CTI is not in scope for this project

1. Based on this document, it is assumed that any / all language requirements outside of English are OOS, please confirm.

Correct. English is the only language in scope

1. In terms of data security, does UTH currently utilize IP Whitelisting or any other URL blocking capability that prevents outside users from accessing UTH websites? If so this may have implications on externally faced portal solutions.

We are implementing Service Now as a hosted solution, so we won’t be blocking access based on whitelisting.

1. Does UTH have an estimate in terms of the budget allocated for this project / program?

Yes, we have a budget and we are looking for vendor pricing to implement this project

1. Can UTH please elaborate on any mobile device requirements (minimum viable product requirements) if any?

We have an extensive boots-on-the-ground desktop support team. Ideally, we would want them to be able to get and manage incidents from their phones. Additionally, we are interested in possible asset management. For example, is it possible to update an asset record from a support team members’ phone?

We would also like to be able to manage workflow approvals from mobile devices.

1. Can you please clarify if you have an integration service bus or existing mid servers that can be leveraged for integration related needs?

We do not have an integration service bus

1. Is UTH looking for pricing on Governance alignment and enablement through this RFP? This would assess existing roles and responsibilities, approval gates, stakeholders, guiding principles and any other information available relating to decision making. Ultimately this would provide UTH with revised R&Rs, governance model, workflows, collaboration framework, and guidance on policies, standards, etc., enabling UTH to manage their new solution properly and with confidence.

Yes, we are interested in the pricing for this.

1. Is UTH looking for pricing on Process enablement through this RFP?

This is out of scope for this project

1. Please describe UTH's planned governance structure for status, decisions, escalation, visibility, etc.

We currently do not have one governance structure.

1. Will UTH dedicate a project management resource or is the vendor expected to provide a FT PM?

We will have a PM on our team that will directly interact with your PM. This will not require a FT PM from the vendor.

1. It is assumed that UTH will run and own UAT testing (test planning, test script creation, test results). If not, what kind of support is UTH looking for in this space? Vendor prefers the client to perform UAT independently as a confirmation of our work.

We will own UAT, but we will look for guidance on best practices for the scripts and test planning.

1. What systems and / or tools does the UTH's Infrastructure and asset team have in place to assist in Discovery reconciliation outside of SNOW Discovery and Splunk (e.g., SCCM)? Are there other tools the UTH wishes to integrate with to automate this process?

We currently have multiple SCCM and JAMF environments. We are looking at consolidating that data into Service now for updating asset information.

We would like COUPA to feed into the asset creation process

1. With regards to trending reports, has UTH purchased ServiceNow's Performance Analytics ("PA") licensing or does it come with the level of ITSM purchased?

We purchased ITSM Professional, and that includes a level of Performance Analystics.

1. Does UTH wish to implement Knowledge Mgmt., key functionality for self-service portal?

Yes, at least internally at first.

1. Are you looking to see if we already have BAAs signed?

We want to make sure that the selected implementation partner will sign a BAA regarding their access to HIPAA, FERPA and PHI during the implementation process.

1. During the engagement call there was mention of trying to get to a single change process but it was also stated some groups might do it different. How many groups would potentially have a different change process? How different would the process be for each group?

We currently have two change management processes, one for infrastructure and one for clinical applications. Each has its own focus. It is possible they could be aligned, but we will be looking for guidance from our implementation partner on how to do that.

1. The implementation of a self-service portal is stated, but not included in the pricing section. Is the portal indeed in scope for this project and shall we add a table with recourse estimates for that?

It is in scope, please add pricing.

1. CMDB is not called out separately with a tables for a resource estimate. Although it would be a limited implementation, shall we provide a separate table?

Yes please

1. As deliverables, are you expecting an advisory engagement? If so, shall we use a table to show the breakdown/cost of this pre-configuration workstream?

Yes please

1. You mention Performance Analytics as part of the portal. Are you looking to implement the Service Now complimentary PA as part of incident management and show views in the Portal? Are you licensed for Performance Analytics Premium?

We are licensed for Performance Analytics as part of ITAM Professional

1. You are requesting that we demonstrate prior experience with Asset Management, minus Software Asset Management. Are we to assume that Software Asset is not in scope for this engagement?

Correct, software asset management is not in scope for this project

1. Would each change board have its own change process or would the process be the same and different changes route to different change boards?

Different changes would route to different change boards; likely some change process differences.

1. Can you give additional details on how the change processes would be separate? Is it based on department, company, organization, etc? Would there be some overlap between processes?

Differences are based on the change board and the department. There is potential for some
overlap.