# Questions for RFP #251-24-429 – SERVICE MANAGEMENT SYSTEM

| Reference | Vendor Question | Answers |
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| | With regards to users, it appears that parents, students, faculty, and staff are all in scope. Are there unique authentication requirements for parents and students that are different than faculty and staff? Please include what integrated system(s) will be used to authenticate the different types of users (if they're different). Note: the User Authentication section is helpful, but it does not differentiate between types of users. Should we assume the preferred and accepted methods cover all user types? | Students submit service requests via their schools. Staff submit service requests via single sign-on, delivered by our SSO and IDP vendor, Rapid Id, via an icon appearing in portal delivered by our vendor, Class Link. |
| | The RFP mentions an intuitive user interface for users as young as PreK. Can you please elaborate on how a PreK student would interact with the system and the expectations for the system UI? For example, how would such a student identify themselves to the system and what type of interaction(s) would be in scope for the initial implementation? | Every student in WCPSS has a unique identifier called a WakeId. Currently they submit their requests to staff at their school site, however eventually we would like to see our students submit service requests directly through an intuitive interface. |
| | With regards to Service Management, is WCPSS open to adopting best practices and out-of-the-box capabilities related to incident, problem, change and request management or are there processes already in place that need to be adapted to the new ServiceNow solution? | Yes. |
| | For the Service Catalog, and specifically regarding items in the catalog, how many catalog items are in scope for initial deployment? And for the in-scope catalog items, are there | The service catalog is clearly defined categories such as connectivity, device and application issues. We do have some third-party vendor |

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| | unique workflow requirements or will a simple workflow with one approval and one fulfillment task be sufficient? | support for specific applications; however, they are part of the hand off in the support process. |
| | Device management calls out integrations with existing systems. Can you please list the existing systems that would be in scope for initial deployment? | Our current device management platform vendors include JAMF, Intune, Google Admin Console, and SCCM. |
| | Device management also mentions security policy enforcement. Is this a requirement that ServiceNow needs to meet or do the integrations cover this requirement? | The intent of this requirement is that the workflows need to align and support our current security policies. |
| | For software license management, is there an existing inventory of software entitlements? | Our software licenses are managed via an internal tool. Information can be shared from that tool as needed. |
| | With regards to incident and asset management, is there a need/requirement for walk-up capabilities (like a genius bar, or walk-up help desk) at different sites/locations? If yes, how many sites/locations? | Currently, our walk-up location for incident support is centralized in one location.<br><br>For asset management, there is not current walk-up support, but there may be potential for sites in the future. |
| | To support, deploy and manage asset lifecycles, is there a Field Service team that is deployed to fulfill those requests? If yes, do these Field Service team members carry their own inventory of assets/consumables for on-site use? | We currently have service technicians that serve assigned regions. We also have a team dedicated to repair. Some technicians do carry spare parts. Our eventual goal is to allow in field repairs across the enterprise. |
| | With regards to work order and maintenance history, are the team(s) receiving these work orders managed by a central dispatch or do they pull their work orders and manage autonomously? | All service requests are managed and reported from a central dispatch. |
| | Is there a requirement for pre-planned / regularly scheduled maintenance on assets? If yes, how many different types of maintenance schedules are in scope for the initial implementation? | Currently, we replace or repair damaged assets as an event occurs. Scheduled maintenance is a goal. |

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| | Configuration management mentions IT assets and relationships. Are there existing inventory systems with the IT asset and relationship data or is WCPSS seeking to have ServiceNow find and maintain those assets through agent-based or agent-less methods? | Currently our inventory management system has unmanaged and managed physical assets. User device and profile data are loaded into Cherwell, our current service management tool. We are open to exploring different options. |
| | Are virtual and cloud assets in scope? If so, what cloud providers should be included in the initial implementation and what type of virtual/cloud assets need to be traced in those environments? | Virtual and cloud assets would currently reside in AWS, Azure and Google. They are not traced currently. |
| | For the 200+ sites, is the network associated with these sites a single logical network or should each site be treated as an independent and autonomous network? | Each site is segmented of a single logical network. While service requests are scoped by location, they are all managed centrally. |
| | Are the in-scope Change Request workflows standard change workflows (i.e., single approval followed by CAB approval) or does WCPSS have unique change workflow requirements? If so, can those workflows or a sample workflow be shared? | Our current model is single approval followed by CAB approval. |
| | The requirements include 'onboarding and transmission of data between existing system(s)'. Is this referring to legacy ticketing and asset data that needs to be imported (onboarded) to the new system? If yes, which systems will need data migrated to ServiceNow and how many unique records per system? | We will not be importing legacy service management data into the new system. We use a blank slate model at startup. We will be importing our existing asset inventory data into the new solution from Destiny Resource Manager. |
| | ServiceNow is certainly capable of integration with other systems. Which systems would need to be included in the initial implementation? | Our current service management tool supports integrations with M365, Google, Oracle 12.1, PowerSchool (NC DPI version) and Destiny Resource Manager. |
| | Like the previous question, which applications that require Web Service APIs, JavaScript APIs and Data import/export are in scope for the initial implementation? | Please see above. |
| | The requirements mention the creation of custom assets and attributes. How many and what type of custom assets would be included in the initial implementation? | Our intent is to use default asset attributes as much as possible keeping the need for custom asset attributes to a minimum. Implementation of the new solution will drive this work. |
| | Which enterprise monitoring systems are in scope for the initial implementation? Will these monitoring systems only provide | Our intent with this solution is that monitoring and alerting will come directly from the new solution and cloud hosting environment. |

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| | asset data and attributes, or will they also be providing real-time alerting (i.e., no disk space, critical failure, etc.)? | Our expectation is that the solution will be elastic such that disk space shortages and critical errors are addressed by the vendor. |
| | The new asset requirement mentions importing or scanning of new assets. Does WCPSS have a main supplier with standardized receipts, tracking slips and invoices? What suppliers are in use that would be included in the initial implementation and require automated asset population? | Yes, our current vendors provide this for import. |
| | The Asset management section doesn't mention the procurement of assets. Is procurement in scope or is that managed in a different system? If it is managed separately, does that system need to be integrated to pre-populate/stage assets and purchase orders? | Yes, procurement of assets is in scope. Purchase orders are generated via our Oracle ERP system. Vendors provide order data to us that needs to be imported into the service management solution. |
| | How many different subject matter areas are in scope for initial implementation? And of those areas, how many are not traditional IT (like Transportation Help Desk and Special Education)? | All subject matter areas follow the core processes of the central help desk and should be considered traditional IT. |
| | Confidential and role-based tickets are a configurable feature in ServiceNow. Can you elaborate on this requirement and quantify the number of requests (or number of support groups) that will require a hidden/confidential ticket capability? | Our current tool does not provide the ability to manage content viewing based on role. The solution we are seeking needs to be able to support all service requests, public or private in nature. An example of a confidential request would be investigations. The number tickets annually vary. |
| | The contact center and voice requirements mention support for Artificial Intelligence. Can you elaborate on the use case and expectation(s) for using AI in the system? | Our intent for AI is the ability to assist in the generation of knowledgebase articles and narratives in addition to chat bots to provide additional support to our customers. |
| | The customer requirements identify two different interfaces (one for students and one for staff) as an example of managing multiple levels of access. Are there other audiences besides this example that should be included in the initial implementation? | See user information. No current plan for additional user types. |
| | Related to the previous question, should access levels and varying interfaces by audience be solely function-related (i.e., filtering | One standard interface with filtering request options is preferred. |

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| | request options) or will the look and feel (branding, logos, layout) differ between audiences? | |
| | Support and customer service identifies training and support documents be provided to district-level and site-level administrators. Is there a requirement for live/instructor-led training or will a train-the-trainer approach with recorded training be sufficient? If live training is preferred, how many training events would be in scope for the initial implementation? | Train-the-trainer approach will need to be specified for each department depending on their specific duties with recorded sessions and documentation of the initial training should be sufficient. |
| | The Data Retention and Deletion section refers to maintenance of student data. Are there other unique requirements related to student data that we should include in our proposal (encryption, data anonymization/scrubbing, reporting, etc)? | Data anonymization and encryption and reporting are in scope of this proposal. |
| | Can you provide specifics regarding the volume and types of service incidents reported annually to better understand the scale of incident management needed? | The service incidents that are reported varies depending on the nature of the incident. For example, these are some of the reported incidents that may occur more frequently but are not limited to:<br><br>1. Transportation requests<br>• Bus Route/Stop Assignment<br>• Transportation for special needs students<br>• New Student who doesn't have bus assignment<br>• New enrollee who does not have bus assignment<br>2. Technology Services Division requests<br>• All TSD related requested per service/category etc...<br>3. Risk Management requests<br>• Vehicle requests for drivers<br>• Student & Visitor Accident Report<br>4. Report requests<br>• Requesting reporting on departmental data such as ticket counts for department etc...<br>5. Other departmental requests such as Payroll, Facilities, Communications and directing customers. |

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| | For problem management, are there existing tools or processes that the new system should integrate with or replace? | Our goal is implementing best practice with the least number of customizations possible. |
| | Could you detail the current IT infrastructure and services that change management will need to track, to understand the complexity and scope? | Change management will cover all aspects of systemic changes that could impact our customers. Examples include code moves, infrastructure hardware changes and application changes and releases. |
| | How extensive is the current service catalog, and are there any special requirements for how services should be presented in the self-service portal? | Please see earlier response. |
| | What are the current SLA performance metrics, and how are they measured and reported? | We currently have a common set of SLA's. Our goal with the new system is have different SLA's based on application and service area. |
| | Could you specify the current inventory of technology assets, including types and quantities, to assess the scope of inventory management? | 20,000 desktops,274,000 laptops,35,000 tablets,8,000 printers,21,000 displays,16,000 connectivity,9,000 carts, 5,000 peripherals |
| | For asset lifecycle management, what are the specific stages you wish to track, and are there any regulatory or compliance requirements affecting this? | We wish to track the device lifecycle from cradle to grave. We do have federal and state regulatory/compliance guidelines including inventory reporting and device disposal. |
| | What are the current mechanisms for tracking and managing software licenses, and what challenges have you encountered that the new system should address? | Currently, we do not have issues managing software licensing. |
| | Regarding the integration with various other systems (Oracle ERP, Cisco IP phone system, etc.), could you provide more details on the existing integrations and any known challenges? | There are no challenges currently. Our Cisco phone system is used to capture requests, the voicemails become artifacts within the ticket in our current service management tool. Oracle ERP and PowerSchool data are used for staff and students, respectively. |
| | For the reporting capabilities, can you provide examples of reports you currently use and any gaps in functionality you wish to address? | WCPSS prefers to use industry best practices for report creation and data dashboards. Our goal is for our customers to be able to query and report on data objects that they can access based on their roles. |

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| | Can you elaborate on the expectations for customer and technical support post-implementation, especially concerning response times and resolution processes? | Technical and systems support by the awarded vendor is critical to success of this project. As stated in the RFP narrative, it is essential that WCPSS has technical support contact when the system experiences issues. |
| | For data retention and deletion policies, are there any legal or compliance frameworks (beyond what's mentioned) that the system needs to adhere to? | Yes, all data must follow NC State Data retention guidelines. |
| | How is user authentication currently managed, and are there specific security standards or protocols that the new system must support? | SSO utilizing SAML 2.0 is essential for authentication. This is currently the method used at WCPSS with our service management tool. |
| | For the various user roles defined, could you provide more detail on the permissions and access levels, especially for custom roles you anticipate needing? | As stated in the RFP narrative, it is essential that roles are assigned by job title and assigned areas. For example some privileged roles will be able to view and edit all service requests and status while other will only have the ability to view events for their specific locations. |
| | Are there specific challenges or limitations with your current system(s) in managing the lifecycle of assets or service requests that the new system should overcome? | Our current system is antiquated and has limited functionality. This is the core reason that WCPSS is seeking a flagship solution. |
| | What are the key features you are looking for in a system to be user-friendly and customizable for school-age children, and how do you measure success in this area? | Ease of navigation, orientation and layout of GUI, common language that is relevant and understandable across all of our users and aesthetically appealing interfaces that are ADA compliant. |
| | Finally, could you detail any specific expectations or requirements for the solution's mobile app functionality, considering the diverse device ecosystem (iOS, Android, Windows, MacOS, ChromeOS)? | WCPSS prefers a solution that will run natively to these devices and operating systems rather than forcing access through a web browser on a smart device. Chrome and FireFox are the default browsers used at WCPSS. |
| RFP Section Project Objectives, | What are the key pain points or challenges the department is currently facing with its existing systems, and what specific outcomes or improvements are you looking to achieve with the new system? | Please see earlier response. |

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| RFP Section Requirements, 2. Product, b., v, Page Number 7 | Regarding Support for an integrated contact center including VOIP routing, automated call distribution, intelligent voice routing, live "chat support", voicemail, email ingestion  and Artificial Intelligence. What solutions or resources do you need an integration with? | WCPSS currently uses Ring Central and Cisco's VOIP telephone system. |
| | When is the proposal due date? Page 11 says 3/28/24 2:00 PM EST, and page 3 says 4/1/24 2:00 PM EST | Proposals are due no later than April 1, 2024, at 2:00pm ET.  The deadline on page 11 is incorrect.  An addendum has been posted to both bid websites to clarify the due date. |
| | When does WCPSS plan to award? | As soon as possible. |
| | When does WCPSS want the new service active? | As soon as possible |
| | How many estimated total users will there be on the platform? | We want unlimited user access. Please see the RFP for current student and staff counts. |
| | How is the existing service request and change approval process structured today? | Cherwell is our current service management tool. Change management is addressed via SharePoint and automated workflows. |
| | How are SLAs defined today? How are they based in regard to working hours or types of tickets coming in? | Our current SLA's are defined by required response times and predefined ticket priorities. WCPSS wishes to enact multiple SLA's based on differentiated conditions. These will be defined as part of the implementation based on best practice and standards. |
| | What is example KPIs that are being reported or that you would like to report on in the future? | First call resolution, SLA breaches, abandoned service requests, no contact with customer, call volumes by agent, customer satisfaction. |
| | What are to most common software vendors you work with today as you are trying to optimize software spend? | This question is irrelevant to the bid. |

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| | How do the onboarding/offboarding procedures work today? Are there diagrams of the teams, tasks, and systems involved in today's process that we can reference? | They are manual currently with heavy dependency on human capitol. |
| | Is AI an area of interest today? Whether that is an AI chat solution for citizens to engage in on a portal, an internal chat solution embedded in a tool such as Microsoft Teams, or AI recommendations on how to respond and resolve a ticket as an agent. | Yes. |
| | What monitoring tools or notification tools are you using today in regard to outages, alerts, and on-call scenarios? | We have internally developed alerting currently. |
| | Is project management important today? If so, what tools and details can you share about your existing project management processes regarding IT or other non-IT departments? | Our Enterprise Project Management office utilizes Monday.Com for project management but is eager to leverage the new service management tool as an integral part of the project management. |
| | How are assets managed today? Do you have a breakdown of how many end-user devices and infrastructure assets that are managed today? | Currently we have unmanaged and managed assets in our inventory system.  Please see RFP for end – user and asset counts. |
| | In addition to O365, Oracle, and Cisco are there any other integrations that are a must-have or nice to have? | These are primary integration points.<br><br>Intune, JAMF, Google, etc. Would be additional integration points. |

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