1. ANNEX 4 - SCENARIOS

1.1 PURPOSE

To facilitate the Proponent's comprehension of the City's requirements, a series of Scenarios is provided in this Annex 4.

The scenarios represent a subset of the Requirements, which are provided in detail in Annex 1 – Schedule of Requirements, Annex 2 – Detailed Functional Requirements, and Annex 3 – Detailed Technical Requirements.

1.2 INSTRUCTIONS FOR SCENARIOS

Explain how the Proponent's solution provides the functionality, with extra attention to the items referenced in each scenario's "Please highlight" section. The explanation for each scenario should be maximum 2 pages of text, with no more than 4 pages including graphics.

1.3 LIST OF SCENARIOS

A. Major Outage (Citywide & VPD)
B. Simple workflow for a Business Unit
C. New item in the Service Catalog
D. Change Request Lifecycle
E. Field Service Technician (Mobile Solution)
F. Out of Box Implementation

A. MAJOR OUTAGES (CITYWIDE & VPD)

---Start of Scenario ---

a) Citywide Outage

A city employee is unable to access the corporate payroll system and logs an incident ticket with the Help Centre (Ticket #1).

Over the next few hours, the Help Centre notice more tickets coming in that appear to be related.

- Demonstrate how the Help Centre can determine there is a broader problem than just the original ticket
- Show how the multiple tickets can be related or connected to each other
- Show how the outage is communicated to employees across the City, VPL, and VPD

Ticket#1 is approaching its SLA:

- Demonstrate if/how the assigned technician/team is alerted of an impending breach
- Even with the alerts, Ticket#1 breaches it's SLA - show how it will be escalated to management

The technician closing Ticket #1 believes the solution to resolve it is new, and not currently in the Knowledge Base:

- Demonstrate how the technician could flag or otherwise begin the process for this solution to be added to the Knowledge Base
- Demonstrate how the technician could check to see if it was a duplicate of an existing KM article
- If the solution includes a KM approval process, include a screenshot of the workflow to approve and publish this new KM article

b) VPD Outage

A VPD employee is experiencing problems with a police database and logs an incident ticket with the VPD Help Centre (Ticket #2).

Over the next few hours, the VPD Help Centre notice more tickets coming in that appear to be related.

- Demonstrate how the VPD Help Centre can determine there is a broader problem than just the original ticket
- Show how the multiple tickets can be related or connected to each other
- Describe how the outage is communicated to *VPD employees only*. (Due to privacy and security requirements, City and VPL employees must not receive communications on this outage, nor be able to view the incident ticket

---End of Scenario ---

B. SIMPLE WORKFLOW FOR A BUSINESS UNIT

---Start of Scenario ---

VPL Facilities work closely with the City Real Estate & Facilities Management (REFM) and often have to transfer work requests between teams (across separate AD Domains).

a) Ad-hoc Service Request

VPL often host movie screenings in the Children's Library and need to request placement of a tarp over the skylight. VPL Facilities receive the tickets but need to transfer them to REFM Exterior Maintenance. REFM charge $30/hr for this type of task, which must be displayed on the request form.

REFM decide to build a simple workflow for this process. The assigned staff member is comfortable using a computer but does not have any programming experience. The initial ticket will come into VPL Facilities who will assess the ticket and assign to REFM Exterior Maintenance. The work order form requires a time tracking feature that the assignee can turn on/off as they begin or end work.

REFM also require a report which lists service requests that have an associated charge.

b) Regularly Scheduled Service Request

Every month REFM are required to run maintenance tests on the City's generators. This is a prescheduled task, and automatically generates a work-order for the 2nd Saturday of every month. The REFM Manager assigns a technician, and email notification is automatically sent two weeks prior to the affected business units. REFM need to track the time, but do not charge this work to the business units.

This month, VPL receive the notification and due to a major upgrade occurring that weekend, cannot accommodate the maintenance on the scheduled date. The VPL Facilities manager responds to the notification and requests the VPL maintenance takes place the following Saturday. The REFM Manager reschedules the VPL work order, and assigns another technician who is on roster during the following weekend. Other Business Units will proceed as normal.

---End of Scenario ---

- [item a only] Can the non-technical staff member build a workflow without in-depth programming knowledge?
- [item a only] Provide screenshots of the components of the system used to build the workflow
- [item a only] Are technical staff required to assist building the workflow, and to what level?
- [item a only] Provide a screen shot of the report showing service requests that generated a charge.
- [Item b only] Provide screenshot of how the REFM Manager will reschedule and reassign the work order
- Provide a screenshot of the completed workflows
- Provide a screenshot of the time tracking functionality

C. NEW ITEM IN THE SERVICE CATALOG

---Start of Scenario ---

A new model of laptop has been approved for use within the City. Ordering the new laptop will result in charge to the requestors cost centre of $1000.

The laptop can be ordered with a storage size of 512 (default) or 1TB (additional $200). The laptop comes with a carry bag as standard, but the requestor can decline the bag and reduce the price by $30. The requestor's manager must approve the purchase before the request.

The desktop team must create a new item in the service catalog with the following parameters:

- Include a basic description
- Include a photo
- Include a mandatory field (select storage size of either 512MB or 1TB)
- Include an optional field to decline the laptop bag (- $30)
- Show price of item, and show "shopping cart" with adjusted cost (use: 1TB without laptop bag)
- Build a simple approval workflow - the employee's manager can approve or deny the request – if approved the ticket is assigned to the Desktop team
- Insert the new item into an appropriate location within the service catalog

---End of Scenario ---

- Provide a mockup of the new item as it appears in the Service Catalog
- Provide screenshot of how the form will appear to an end user
- Provide screenshot of how the ticket will appear to the fulfilment team (ie: desktop)
- Provide screenshot/mockup of the workflow

D. CHANGE REQUEST LIFECYCLE

---Start of Scenario ---

The Server team must apply some patches to a server running a business critical application.

The application vendor has just released two patches (patches #0001 & #0002) and is advising that patch #0001 be applied immediately due to recently discovered zero-day vulnerability.

The application support team have assessed patch #0001 and determine the patch must be applied that evening. They know they will need to submit an emergency request as they will not meet the required lead time.

Patch #0002 addresses a functional issue and does not require urgent application. The team expects it could impact another integrated system and determine they will need additional time to test. They plan to apply it in three weeks' time. Unbeknownst to the application support team, this date occurs during a critical business period and a "brownout" or heightened change awareness process is in place. Tickets scheduled to occur during that week will be subject to additional scrutiny before approval is granted.

Regardless, the application support tech submits the second RFC for #0002 during the heightened awareness period. Meanwhile, the Change Manager is preparing the agenda for the CAB meeting…

---End of Scenario ---

- Using out of the box (OOTB) change request forms, create an emergency request for #0001 and a normal request for #0002.
- Provide screenshot of how the change forms will appear to the server team submitting the change request
- Provide screenshot of how the tickets will appear to the CAB/Change Manager
- If the solution includes a change calendar, provide screenshot(s) of the calendar showing
    a. The emergency request (#0001)
    b. The "brownout"/heightened change awareness period
    c. The standard request (#0002)
    d. Dates of biweekly council meetings (every second Wednesday) must also be visible
- Describe how the both the request submitter and the Change Manager can see that the second ticket is scheduled during a "brownout" period
- If the solution generates a Forward Schedule of Change (FSC) report, please provide a screenshot
- If the solution includes tools to aid in preparation for the CAB (Change Advisory Board) meeting, please include a screenshot.
- Describe how the solution aids in the operation/running of the CAB meeting

E. FIELD SERVICE TICKET (MOBILE SOLUTION)

---Start of Scenario ---

While finishing a job at park's amenity kiosk, an electrical technician from REFM receives an alert on their cellphone that their team has been assigned a service request to install a new light fixture at a nearby City swimming pool. After checking their work queue, they see it is a high priority request and accept the ticket, adding it to their own work queue. The client (Pool Manager) receives an acknowledgement that the ticket has now been assigned to a technician.

The technician arrives at the pool and uses their mobile device to check a knowledge article on installing that particular model of light fitting before updating the ticket with a description of the work performed, and changing the status to "Resolved".

The pool manager also mentions a problem with a water pipe at the far end of the pool. The technician knows it will be assigned to a different team. The technician creates an incident ticket on behalf of the Pool Manager and attaches a photo and a GPS location. The technician categorizes the ticket as "Plumbing" which results in the workflow sending the new ticket to the correct team.

---End of Scenario ---

- Does the mobile solution support "push" messaging (ie: without requiring the user to be in the specific application at the time)
- Provide a sample/screenshot of tickets assigned to a technician (how easily can the technician check assigned work and prioritize?)
- Describe how the technician can use the mobile solution to look up information in the Knowledge base (are knowledge articles targeted to the user based on business unit and role?)
- Provide screenshots of a ticket update and resolution
- Does the solution allow the technician to create a new ticket from the mobile solution?
- Does the solution allow for the attachment of photos and association with GPS location from the phone's Location Services.
- Describe how the "source" of the plumbing ticket is displayed, and describe how it indicates the pool manager is the client even though it was created by the electrical technician on their behalf.

F. OUT OF BOX IMPLEMENTATION

---Start of Scenario ---

Due to a tight timeframe, the City decides to implement the new system out-of-the-box (OOTB). The immediate requirements will be the core platform, Incident Management, Service Request Management, Change Management, and Knowledge Management. The core platform will be integrated with AD to provide single sign on.

The City expects to have around three workflows that will need to be provided for out of the box and will need to be custom built.

The City currently distributes monthly reporting of Service Level Performance by team, and will require this functionality before switching over to the new system.

---End of Scenario ---

- Does your solution offer a standard “Out of the box” installation option?
- What is the timeframe for a standard OOTB install with IM, SR, CM, KM modules and no further customization? Please provide the high level schedule.
- What level of transition support is provided with the OOTB implementation
- Please describe if OOTB installation is provided by the application vendor, third-party, or a combination?
- Does the out-of-the-box option allow for customization by the client? Please describe if training is required and expected number of days of training required to learn how to build workflows.
- Does the installation process follow an industry standard methodology such as Agile or Waterfall?
- Does the OOTB install include client branding or “skinning” (client logo/color schemes)? If not, what is the expected timeframe to brand?
- Does the OOTB solution include end-user training materials? Are these included, or at additional cost?
- Please describe the base Knowledge Base content provided in OOTB.
- Please provide a sample screenshot of your default ootb Monthly Service Performance report
- Please provide attachments or links to a list of Incident & Service Request types, RFC (Change) types, and standard reports provided out of the box