



PROCUREMENT SERVICES

CITY OF SURREY, SURREY CITY HALL
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ADDENDUM No. 1

REQUEST FOR PROPOSAL No.: 1220-030-2024-049

TITLE: IT SERVICE MANAGEMENT REPLACEMENT

ADDENDUM ISSUE DATE: DECEMBER 5, 2024

REVISED CLOSING DATE AND TIME: ON OR BEFORE THE FOLLOWING DATE AND TIME (THE “CLOSING TIME”):

TIME: 3:00 P.M. (LOCAL TIME)

DATE: JANUARY 3, 2025

INFORMATION FOR PROPONENTS

Proponents are advised that Addendum No. 1 to 1220-030-2024-049 is hereby issued by the City. This addendum shall form part of the contract documents and is to be read, interpreted and coordinated with all other parts. The following information is provided to answer questions raised by Proponents for the above-named project, to the extent referenced and shall become a part thereof. No consideration will be allowed for extras due to the Proponents or any sub-contractor not being familiar with this addendum. This Addendum No. 1 contains three (3) pages.

REVISED CLOSING TIME:

Delete Section 2.1 in its entirety and substitute with Section 2.1 below:

“2.1 Closing Time and Address for Proposal Delivery

The Proponent should submit the Proposal **electronically** in a single pdf file which must be delivered by email at: purchasing@surrey.ca

on or before the following date and time

Time: 3:00 p.m., local time

Date: January 3, 2025

(the “Closing Time”).

Confirmation of receipt of email will be issued. Proposals that cannot be opened or viewed may be rejected. A Proponent bears all risk that the City’s receiving computer equipment functions properly so that the Proposal is received by the Closing Time.

Note: The maximum file size the City can receive is 10Mb. If sending large email attachments, Proponents should phone [604-590-7274] to confirm receipt.”

QUESTIONS AND ANSWERS:

Q1. On page 26 of your RFP you state you want to Migrate open and active tickets, customers, and exportable data such as historical tickets and knowledge articles. Can you please provide additional information on scope of records?

A1. Scope records include following details but are not limited to the following:

- a. Incident records - details, status, journal entries, categories and assignments, SLA, and related fields, attachments;
- b. Service Request records - details, status, journal entries, categories assignments, dependencies, approvals, SLA, and related fields, attachments, tasks ;
- c. Knowledge articles - details, status, journal entries, categories, and related fields;
- d. Customer records - ticket-related details not directly provided by integration with PeopleSoft;
- e. All attachments;
- f. Project management records, child tasks;
- g. Change management records; and
- h. Customer survey records.

Q2. Can you please confirm all integrations you currently have with Cherwell (i.e. Microsoft Intune, AD, existing City systems; WFM, Power BI, etc.) any additional integrations?

A2. See below:

- a. Single-sign on (SSO/SAML) using Microsoft online services, via login.microsoftonline.com
- b. On-prem Active Directory connection to import new staff accounts / changes to staff accounts (including data about onboarding or offboarding in process), via Cherwell on-prem Trusted Agent connected to LDAP://surrey.ca. The City also use this data to trigger automation processes (Powershell) for onboarding/offboarding.
- c. On-prem Altiris database object import of computer/monitor/software assets, via Cherwell on-prem Trusted Agent connected to SQL server: PRDALTIRISSQL03, Database: Symantec02_CMDB
- d. Microsoft Fabric/PowerBI Service API connection to Cherwell API to load in multiple database tables for main ITSM elements (Incident/Requests/Accounts/Problems/Changes, etc). This is used for reporting via PowerBI.

Q3. Is Asset Discovery included in this project? IF so, how many assets do you have?

A3. See below:

- a. **Auto Discovery is not a requirement and if it is included in a Proposal, its value proposition and functional differentiation will be considered.**
 - b. **It would be helpful to understand:**
 - **The scope of assets discoverable by the solution.**
 - **Automation capabilities and any associated workflows.**
 - **Integration with other tools or systems.**
 - **Reporting and insights generated from the asset discovery process.**
 - c. **Asset counts (approximates):**
 - **Computers – 4,000 (MacOS, ChromeOS, Windows);**
 - **Servers - 850 Virtual (on prem & cloud) and Physical (Ubuntu, Windows);**
 - **Monitors – 5,000;**
 - **Network devices – 300 (Switches and firewalls);**
 - **Printers (Multi Function Devices) – 250; and**
 - **Mobile Devices – 1,200 (phones and tablet devices).**
- Q4. You mentioned on the pre-bid call that you were planning to move forward with FME as an integration and automation platform. Has the decision to move forward with FME been finalized? If a vendor has their own iPaaS tool that would provide similar functionality to FME, would the City of Surrey open to evaluating that iPaaS offering in conjunction with this ITSM RFP?**
- A4. FME: This is the City’s integration platform. The decision has been made and we have already begun our journey with the platform. Any ITSM solution should be able to work with our FME platform and this will be part of the evaluation of any ITSM solution. The use of other IPAAS offerings can be part of the Proposal but the City’s desire is to use our FME integration platform. An ITSM solution that provides webhooks and have the ability to leverage webhooks should be sufficient to work with FME.**
- Q5. The instructions for submittal on page 5 state “submit the Proposal electronically in a single pdf file” however the Excel file “Schedule C-3-1 - IT Service Management Requirements” is very large plus you have the Excel pricing file. Can we please submit a PDF response plus the 2 Excel files? If not what do you suggest??**
- A5. A PDF response to Schedule C and two (2) Excel files for Schedule C-3-1 and C-5-1 is acceptable.**

All Addenda will become part of the Contract Documents.

- END OF ADDENDUM -