

## Attachment 3

### Call-Off Contract - TEMPLATE

**Framework Number:** ITC11445 – Reseller and Associated Services  
**Request Form Number:** ITC11445/140

**THIS CALL-OFF CONTRACT** is made 15/10/2015

#### **BETWEEN:**

- (1) Transport for London ("**the Authority**"); and
- (2) INSIGHT DIRECT (UK) LTD, a company registered in England and Wales (Company Registration Number 579852 whose registered office is at Technology Building, Insight Campus, Terry Street, Sheffield S9 2BU ("**the Service Provider**").

#### **RECITALS:**

A. The Contracting Body and the Service Provider have entered into an agreement dated August 2014 which sets out the framework for the Service Provider to provide certain Deliverables to the Contracting Body or the Contracting Body ("**the Framework Agreement**").

B. The Contracting Body wishes the Service Provider to provide the specific Deliverables described in this Call-Off Contract pursuant to the terms of the Framework Agreement and this Call-Off Contract and the Service Provider has agreed to provide such Deliverables on those terms and conditions set out in the Call-Off Contract.

#### **THE PARTIES AGREE THAT:**

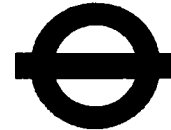
##### **1. CALL-OFF CONTRACT**

1.1 The terms and conditions of the Framework Agreement shall be incorporated into this Call-Off Contract.

1.2 In this Call-Off Contract the words and expressions defined in the Framework Agreement shall, except where inconsistent with the context requires otherwise, have the meanings given in the Framework Agreement. In this Call-Off Contract references to Attachments are, unless otherwise provided, references to attachments of this Call-Off Contract.

##### **2. DELIVERABLES**

2.1 The Deliverables to be supplied by the Service Provider pursuant to this Call-Off Contract are set out in Attachment 1.



2.2 The Service Provider acknowledges that it has been supplied with sufficient information about this Call-Off Contract and the Deliverables to be provided and that it has made all appropriate and necessary enquiries to enable it to provide the Deliverables under this Call-Off Contract. The Service Provider shall neither be entitled to any additional payment nor excused from any obligation or liability under this Call-Off Contract or the Framework Agreement due to any misinterpretation or misunderstanding by the Service Provider of any fact relating to the Deliverables to be provided. The Service Provider shall promptly bring to the attention of the Call-Off Co-ordinator and Commercial Manager any matter that is not adequately specified or defined in the Call-Off Contract or any other relevant document.

2.3 The timetable for any Deliverables to be provided by the Service Provider and the corresponding Milestones (if any) and Key Milestone Dates (if any) and Implementation Plan (if any) are set out in Attachment 1. The Service Provider must provide the Deliverables in respect of this Call-Off Contract in accordance with such timings and the Service Provider must pay liquidated damages in accordance with the Framework Agreement of such an amount as may be specified in Attachment 1. The Service Provider shall be liable for the ongoing costs of providing Deliverables in order to meet a Milestone and Key Milestone Dates. [Time shall be of the essence in relation to the Key Milestone Dates] where stated in the Implementation Plan.]

2.4 The Service Provider acknowledges and agrees that as at the commencement date of this Call-Off Contract it does not have an interest in any matter where there is or is reasonably likely to be a conflict of interest with the Deliverables provided to the Contracting Body under this Call-Off Contract.

### **3. CALL-OFF TERM**

This Call-Off Contract commences on the date of this Call-Off Contract or such other date as may be specified in Attachment 1 and subject to the provisions of the Framework Agreement, shall continue in force for the Call-Off Term stated in Attachment 1 unless terminated earlier in whole or in part in accordance with the Framework Agreement.

### **4. CHARGES**

Attachment 2 specifies the Charges payable in respect of the Services provided under this Call-Off Contract. The Charges shall not increase during the duration of this Call-Off Contract unless varied in accordance with the Framework Agreement. The Service Provider shall submit invoices in accordance with the Framework Agreement and the Charges shall be paid in accordance with this Call-Off Contract.

### **5. CALL-OFF CO-ORDINATOR /COMMERCIAL MANAGER AND KEY PERSONNEL**

The Contracting Body's Call-Off Co-ordinator in respect of this Call-Off Contract is named in Attachment 1 and the Service Provider's Key Personnel in respect of this Call-Off Contract are named in Attachment 2.

# Transport for London



This Call-Off Contract has been signed by duly authorised representatives of each of the Parties.

## SIGNED

For and on behalf of INSIGHT DIRECT (UK) LTD

Signature: 

Name: 

Title: Contracts Manager

Date: 13/10/2015

## SIGNED

For and on behalf of Transport for London

Signature: 

Name: 

Title:

Senior Commercial Manager

Date:

15/10/2015



## Appendix A – CI's In Scope

### Section 1

The CIs In scope of the SCCM 2012 and CMS Data Integration project are listed in the table below.

Remedy CI Class Level 1 Remedy CI Class Level 2 Description			Indicative Volumes (Approx.)
System	Computer System	Primary CI record such as desktop or server	17,000
System Component	Operating System	Operating system that resides on the computer	17,000
Access Point	IP Endpoint	IP Address of networked device	20,000 +
Access Point	LAN Endpoint	MAC Address of network adaptor on device	20,000 +
System Component	Processor	Processor details of a computer system	20,000 +
System	Application	Applications that reside on a computer system. Appendix F outlines the minimum list of applications in scope – this is subject to change upon consultation with the Third Party Supplier.	1,000,000 +



## Section 2

Table 1 – Details of mandatory and preferable attribute fields in Remedy for Computer System CI Class records that need to be populated by solution

Attribute	Format/Expected Value	Status
CI Name*	Device name as it appears on the network (e.g. NetBIOS)	Must Have
CI Description*	Same value as CI Name*	Must Have
Tag Number	For desktops and laptops, this would be the CI Name* value minus any prefix (e.g. WD12345678 becomes 12345678). Virtual devices take the same value as CI Name*	Must Have
Serial Number	Physical serial number of device. In the case of VM systems, this will be the VMWare serial number	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have
Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table	Must Have
Product Cat – Tier 2	As per Product Catalogue table	Must Have
Product Cat – Tier 3	As per Product Catalogue table	Must Have
Product Name+	As per Product Catalogue table	Must Have
Manufacturer	As per Product Catalogue table	Must Have
Site+	As per Site Lookup table	Must Have
Floor	As per Site Lookup table	Must Have
Last Scan Date	Last detected date as reported by CM2012	Must Have
Total Physical Memory	Memory as reported by CM2012	Should Have
Domain	Domain as reported by CM2012	Should Have

Table 2 – Details of mandatory attribute fields in Remedy for Operating System CI class records that need to be populated by solution

Remedy Attribute field name	Format/Expected Value	Status
CI Name*	Operating System value	Must Have

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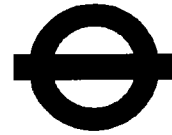
	from CM2012	
CI Description*	Same value as CI Name*	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have
Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 2	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 3	As per Product Catalogue table held in Remedy	Must Have
Product Name+	As per Product Catalogue table held in Remedy	Must Have
Model/Version	As per Product Catalogue table held in Remedy	Could Have
Manufacturer	As per Product Catalogue table held in Remedy	Must Have

**Table 3 – Details of mandatory attribute fields in Remedy for Processor CI class records that need to be populated by solution**

Remedy Attribute field name	Format/Expected Value	Status
CI Name*	Processor type value from CM2012	Must Have
CI Description*	Same value as CI Name*	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have
Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 2	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 3	As per Product Catalogue table held in Remedy	Must Have
Product Name+	As per Product Catalogue table held in Remedy	Must Have
Manufacturer	As per Product Catalogue table held in Remedy	Must Have

**Table 4 – Details of mandatory attribute fields in Remedy for IP EndPoint CI class records that need to be populated by solution**

Remedy Attribute field name	Format/Expected Value	Status
CI Name*	IP address of Computer System	Must Have
CI Description*	Same value as CI Name*	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have



Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 2	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 3	As per Product Catalogue table held in Remedy	Must Have
Product Name+	As per Product Catalogue table held in Remedy	Must Have
Manufacturer	As per Product Catalogue table held in Remedy	Must Have

**Table 5 – Details of mandatory attribute fields in Remedy for LAN EndPoint CI class records that need to be populated by solution**

Remedy Attribute field name	Format/Expected Value	Status
CI Name*	MAC address of Computer System	Must Have
CI Description*	Same value as CI Name*	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have
Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 2	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 3	As per Product Catalogue table held in Remedy	Must Have
Product Name+	As per Product Catalogue table held in Remedy	Must Have
Manufacturer	As per Product Catalogue table held in Remedy	Must Have

**Table 6 – Details of mandatory attribute fields in Remedy for Application CI class records that need to be populated by solution**

Remedy Attribute field name	Format/Expected Value	Status
CI Name*	Product name of application as reported by CM2012	Must Have
CI Description*	Same value as CI Name*	Must Have
Supported	Yes	Must Have
Company+	Transport for London	Must Have
Status*	As per Status lookup table	Must Have
Product Cat – Tier 1	As per Product Catalogue table held in Remedy	Must Have
Product Cat – Tier 2	As per Product Catalogue table held in Remedy	Must Have



	table held in Remedy	
Product Cat – Tier 3	As per Product Catalogue table held in Remedy	Must Have
Product Name+	As per Product Catalogue table held in Remedy	Must Have
Model / Version	As per Product Catalogue table held in Remedy	Must Have
Manufacturer	As per Product Catalogue table held in Remedy	Must Have

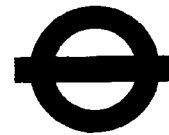
**Table 7 – Relationships between CI classes that need to be created or maintained within Remedy**

Parent CI Class in Remedy	Child CI Class in Remedy	Status
Computer System	Operating System	Must Have
Computer System	Processor	Must Have
Computer System	IP EndPoint	Must Have
Computer System	LAN End Point	Must Have
Computer System	People	Must Have
Computer System	Applications	Should Have

**Table 8 – Status values and scenarios**

Remedy Status	Scenario	Action
Being Assembled	CI record is being built	Attributes can be updated, but status must remain as is
Deployed	CI record is live	No restrictions on updating or creating attributes or records
In Inventory	CI record has been created as a result of delivery or placed into storage	Attributes can be updated, but status and site details must remain as is
Disposed	CI record has been removed from the environment	No update of any kind to be made to the record
Reserved	CI record has been put aside for a particular purpose (SR, CHG or Project)	Attributes can be updated, but status and site must remain as is
Marked for Disposal	CI record is currently going through the disposal process	No update of any kind to be made to the record

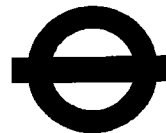




## Appendix B – CI Loading Rules

Ref No.	Loading Rules
1	The computer system class CI records will generally form the basis of initial population of CI records and any subsequent related records.
2	The serial number of a computer system will generally form the basis of the primary identifier to enable a match between the SCCM database and Remedy database.
3	The minimum attributes that are required for each CI In Scope are detailed in section 1 of Appendix A (CIs In Scope).
4	Relationships between records shall be imported and these are outlined in section 2 of Appendix A (CIs In Scope).
5	Duplicate records shall not be created. This includes scenarios where the CI name has changed but the serial number remains the same. Also where a computer has been re-built and potentially a new SCCM GUID has been created, then a new record should not be created but instead, the existing record in Remedy shall be updated.
6	<p>If a CI record has a certain status value, then certain actions shall or shall not be taken. For example if a CI record has a status of "disposed", then no update shall be made to the CI record if SCCM is presenting seemingly more up to date information. A range of scenarios is listed in section 2 of Appendix B (CIs In Scope).</p> <p><b>Note:</b> Orchestrator will always report the CI status as defined by SCCM in the Staging Data set. This means that whatever the status a CI may have in the Core Dataset, TfL have the data to run reports in Remedy like "How long has an asset actually been under management whilst still marked as Being Assembled in Remedy"</p>
7	People relationships shall be captured and related. SCCM shall record the Principal User of a computer system in the form of domain\username. This could be compared to the people record held in Remedy which holds the login ID of that user and then used to create a "used by" relationship.
8	People relationships should only hold the Principal User detail. Previous users should be unrelated.
9	Where the last scan date held in SCCM is greater than the last modified date of a CI record held in Remedy, yet the status is "not deployed", these records shall be exported into a separate report.
10	Flexibility is required for certain rules, CI Types, and product combinations. For example, where a desktop tag number can be populated using the CI name value minus the prefix, this would not be applicable to a server record which uses a different naming convention.
11	CI records will only use values for product categories and product names that appear within the Remedy Product Catalogue. Where values are being presented but these do not exist within Remedy, then a report/log file needs to be created.
12	CI records shall not be created with blank product categories or product name values.
13	CI records shall only use values for site information that is held in a Site lookup table within Remedy. This will relate a location based on a Subnet, which itself derives from the IP address of the computer record held in SCCM.
14	CI records shall not be created with a blank site if a valid entry exists in the Subnet lookup table.





## Schedule 2A

### Request Form (Mini-Competition)

**Framework Number:** ITC11445  
**Request Form Number:** ITC11445/140

**From:** [REDACTED] Commercial ICT - TFL

**Date:** 16<sup>th</sup> July 2015

This is a Request Form for the provision of Deliverables in accordance with this Framework Agreement referenced above. This is an enquiry document only, constituting an invitation to treat and it does not constitute an offer capable of acceptance. Your Proposal must be submitted as an offer capable of acceptance by the Contracting Body; however such acceptance will not occur unless and until the Contracting Body posts notice of acceptance to you.

Attachment 1 of this Request Form sets out the Deliverables required by the Contracting Body, the commercial model to be used and other relevant information.

In your Proposal, you must respond to the information requested in Attachment 1 by completing Attachment 2.

Attached to this Request Form is a draft Call-Off Contract. The Contracting Body is under no obligation to award any Call-Off Contract as a result of this Request Form.

Your Proposal will be assessed against those submitted by other service providers as part of a Mini-Competition process. The Contracting Body will award the relevant Call-Off Contract to the Service Provider with the Proposal that is the most economically advantageous with reference to the assessment criteria set out in Attachment 1.

You must complete and return your Proposal by 12.00hrs 23<sup>rd</sup> July 2015

Please e-mail your Proposal to:

**Name:** [REDACTED]

**E-mail address:** [REDACTED]

**Telephone:** 020 7627 6445

Any queries regarding this Request Form should be directed to the above. Any queries regarding this Framework Agreement should be directed to the Commercial Manager named in this Framework Agreement.

Signed: \_\_\_\_\_  
for and on behalf of the Contracting Body

**Attachments:** Attachment 1: Deliverables to be provided and other relevant information  
Attachment 2: Service Provider's Proposal  
Attachment 3: Draft Call-Off Contract



## Attachment 1

### Deliverables to be provided and associated information

#### **1. Requirement**

TfL requires suppliers to document how their proposed solution meets the criteria outlined within the Functional and Non-Functional Requirements section of this document.

The solution may consist of a single solution, a number of complementary solutions or a service offering.

Complete the table in Section 4 (Functional and Non-Functional Requirements), in line with the guidance detailed at the start of Section 4, and provide responses to each of the questions in Section 5 (Supplier Questions).

#### **2. Introduction**

TfL's Information Management (IM) directorate supports a diverse technology estate on behalf of TfL. IM primarily utilises the Configuration Management System (CMS) to maintain and track technical assets on behalf of TfL. BMC Remedy Atrium System 7.6.04 is TfL's current CMS.

Remedy is TfL's CMS and is used to support the management of TfL's Business Services and their component Configuration Items (CI's). The Service Asset and Configuration Management (SACM) team, Change Management and Incident Management are the key users of the CMS.

Currently, there is no single source of truth regarding CI's managed by TfL's IM Directorate. This means that:

- TfL is hindered in its ability to implement changes quickly, flexibly and without risk of impacting the existing services.
- TfL is unable to manage its IT assets and its associated costs effectively; leading to avoidable cost's being incurred.

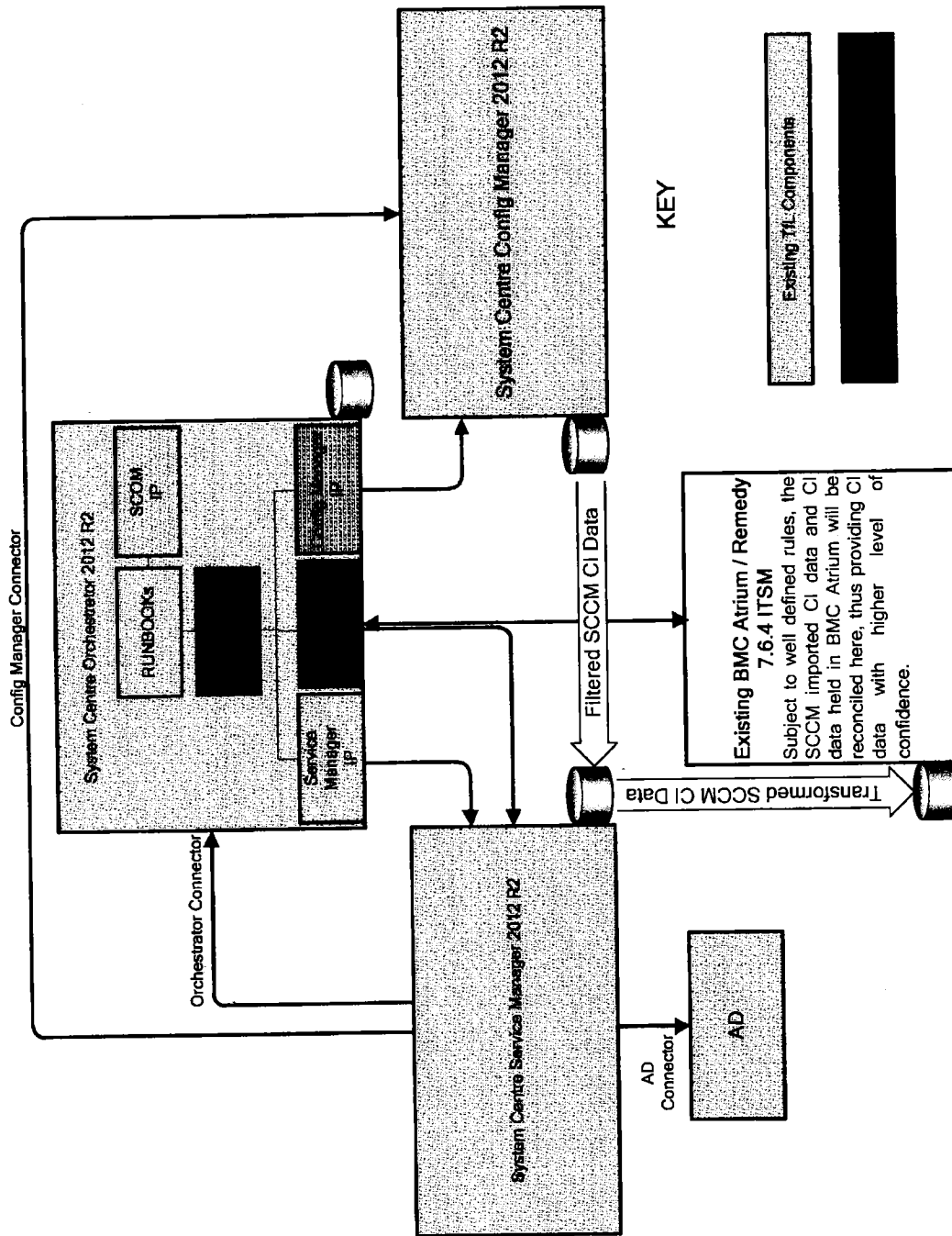
The CMDB Enhancements Programme has been initiated to address these challenges. The integration of the TfL's Microsoft System Center Service Manager 2012 (SCCM 2012 R2) with TfL's CMS is one element of the Programme.

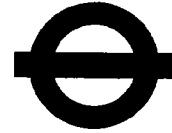
This document describes the functional and non-functional user requirements for the integration of SCCM 2012 and the CMS for which TFL require a solution.

The SCCM and CMS Data Integration project that this RfQ relates to, contributes to the CMDB Enhancements Programme objective of ensuring all master data related to CI's within the TfL IT estate is maintained in a single source.



## 3. TfL Design





The above diagram displays the constraints that any proposed solution must work within. All components shaded in green are pre-existing TfL components that a solution must work with.

The scope of the required solution is limited to the components shaded in red.



## 4. Functional and Non-Functional Requirements

### Guidance on Completing the Functional and Non-Functional Requirements Table

The following columns have been provided by TfL and require no input from the supplier:

- *Req ID* – This column provides a unique Requirement ID for each requirement, and can be referenced within any documents produced to support responses to this RFQ.
- *Requirement Description* – Description of the TfL Requirement.
- *Priority(M,S,C)* - TfL requirements are prioritised as follows:

<b>M</b>	Must Have. A requirement that is critical for the required benefits of the change to be delivered.
<b>S</b>	Should Have. A requirement that is not critical, but provides significant benefits to the business.
<b>C</b>	Could Have. A requirement that adds value but does not provide significant benefits to the business.

The following columns must be completed by the supplier:

Suppliers are required to produce a Statement of Work detailing how their proposals meet the requirements outlined in this document.



Tools and Expertise Requirements		Priority
Req ID		
<b>Provision of Tools</b>		
	Provision of required integration packs and connectors as outlined within the diagram in Section 4	M
	Install and configuration of required integration packs and connectors as outlined within the diagram in Section 4, in order for the solution to be able to operate	M
<b>Provision of Expertise</b>		
	Provision of expertise to configure Microsoft Orchestrator	M
	Provision of professional expertise to assist TfL resources in the configuration of an environment to deploy the proposed solution	M
	Ensure that knowledge of how to configure the environment is transferred to TfL resources	M
	Provision of expertise to build extract and load processes for the transfer of CI data into the CMDb	M
	Provision of knowledge transfer and documentation regarding the operation of the solution to TfL resources	M



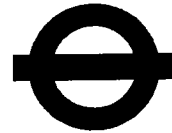


Functional Requirement Description		Priority
Req ID		
FNC1	Ability to integrate with all existing TfL Components as outlined within Section 4 of this document	M
FNC2	The CIs In Scope of the project are outlined in Appendix A (CIs In Scope). Appendix A (CIs In Scope) also outlines the mandatory and preferable attribute fields for the CI In Scope data records that need to be populated by the Solution in Remedy.	M
FNC3	On a daily basis, automatically extract the SCCM CI In Scope data that has changed from the previous day's extraction.	M
FNC4	Ability to manually initiate the extraction of the SCCM CI In Scope data at any time, as and when required by the SACM Team User.	M
FNC5	Apply business loading rules to transform the extracted SCCM CI data into the required format for loading into the CMS. The business loading rules are outlined in Appendix B (Loading Rules).	M
FNC6	Generate error logs as appropriate for all relevant components of the Solution.	M

Non-Functional Requirement Requirement Description		Priority
Req ID		
<b>Security</b>		
SEC1	The solution shall comply with TfL's security framework as outlined in the attached document (IM Information Security Controls Framework v1.1).	M
<b>User Access</b>		
UAS1	The solution shall have a role based secure access functionality that ensures that only the Users are able to access and make use of the Solution.	M



Req ID		Non-Functional Requirement Requirement Description		Priority
Support				
SUP1	The Third Party Supplier shall supply Users with technical system documentation for the Solution e.g. system operational guides and user guides.			M
SUP2	The Third Party Supplier shall provide Third Line Support from 8am to 5pm Mondays to Fridays excluding English public holidays.			C
SUP3	The Third Party Supplier shall provide a Call Off Support service for the proposed solution			S
Maintenance				
MNT1	Any maintenance of the Solution shall occur in alignment with the maintenance windows for Remedy and SCCM			M
Component Lifespan				
CLI1	Each component that makes up the solution shall have an expected life span of no less than five (5) years			M
Scalability				
SCA1	The Solution shall be scalable and flexible so that Users are able to add new CIs to the CIs In Scope.			M
SCA2	The Solution shall be scalable and flexible so that Users are able to change the frequency of CI discovery, transformation and upload into Remedy.			M
Processing Volumes				
VOL1	The Solution shall be capable of processing the estimated volumes of CIs In Scope as outlined in Appendix A (CIs In Scope).			M



## 5. Acceptance Criteria

This Request Form for the provision of Deliverables detailed above is an enquiry document only, constituting an invitation to treat and it does not constitute an offer capable of acceptance.

A pre-requisite of acceptance is that any proposal must demonstrate the ability to deliver all functional and non-functional requirements. Further to this, submissions will be assessed and weighted according to the following high-level criteria:

Criteria	Weighting
Ability to provide the specific tools required	25%
Ability to provide the professional expertise required	25%
Price	45%
Sub-contractor management proposal	5%

TfL reserve the right to run a further competitive process

## 6. Charges

The Service Provider should set out the Charges for the Deliverables required. A formal quotation on Company letter headed paper is required, clearly detailing charges as specified within Attachment 2 Section 2 (Charges).

## 7. Timetable

You must complete and return your Proposal by 12.00hrs 23<sup>rd</sup> July 2015.

The target date for commencement of work on the project is within 2 to 4 weeks of the contract being awarded. TfL's expectation is that the project will be completed within 6 months of commencement.

## 8. Special Conditions

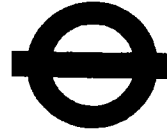
The supplier must prove the required expertise to TfL resources on-site.

## 9. The Contracting Body's Call-Off Co-ordinator:

Name:

E-mail address:

Telephone:



## Attachment 2

### Service Provider Proposal

#### 1. Proposed Solution

The Service Provider should detail how it proposes to deliver the Requirements set out in Attachment 1 in a Statement of Work document. This should include an Implementation Plan, details of any equipment and materials required and service levels. The Service Provider should respond to all questions and requirements asked/asked for in Attachment 1.

### Doc 1

#### **About Kelverion**

Kelverion is an established systems integration and software development organisation specializing in IT Process Automation solutions, founded in April 2010 by previous employees of Opalis, following its acquisition by Microsoft.

Kelverion provides specialist consultancy solutions and applications for the Microsoft System Center suite and, in particular, the System Center 2012 Orchestrator IT Process Automation product. Our expertise ranges from the analysis, design, development and testing of Orchestrator Runbooks to the creation of productised and custom Integration Packs.

The Kelverion team consists of consultants all with over 5 years' experience delivery of IT Process Automation solutions and Orchestrator. Today Kelverion has released over 30 products to work with Orchestrator and works closely with the Microsoft product teams.

Kelverion thanks Insight for selecting Kelverion to supply Orchestrator consultancy and looks forward to developing a long and successful partnership.

#### **Project Overview**

Back in August 2014 Insight conducted a Proof Concept to demonstrate how Kelverion's System Center 2012 Orchestrator driven CMDB Population Solution could be used to intelligently drive the population of TFL's Atrium CMDB.

Following successful completion of that PoC Insight now wish to move this solution into Production.

As part of move to populate BMC Atrium CMDB with data from System Center 2012 discovered data TFL would like to make the data import process to be more efficient and intelligent and take away much of the complexity they have built into their current Reconciliation Engine.

This Production Support document details production support for the CMDB Population Solution in production taking source data from System Center 2012 R2 Configuration Manager, inserting that into System Center 2012 R2 Service Manager and then using this data to populate the BMC Atrium CMDB.

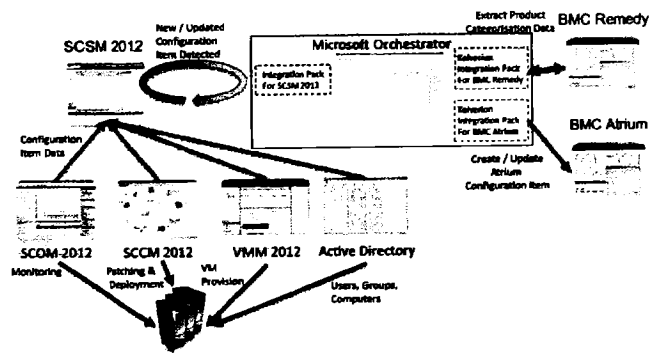
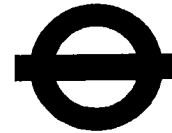


Fig. 1 Solution Architecture

Due to budgetary challenges TfL have asked Kolverion to implement the solution direct into Production. Also the TfL IS Delivery team stated at a meeting in Pier Walk on the 20<sup>th</sup> February that they do not expect to have internal resources available for the installation of Orchestrator and Service Manager for the foreseeable future and as such if external resources like Kolverion could install those components to accelerate the project implementation then they were happy with that approach as long as there was an Operational Handover and Supporting documentation. This SoW covers that request.

## Production System Operational Handover

TfL have the responsibility to manage the Production environment in Live and own operational support and conduct load testing in their production environment. Kolverion will provide 5 days guidance to the TfL team taking over the Operational Support.

This would in the form of a verbal walk through of the solution deployed and over the shoulder guidance whilst TfL resources do the actual hands on key load testing work in their production environment.

Kolverion will not take any responsibility for the Operational acceptance of the solution deployed or support this solution in Production operational.

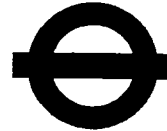
## Insight Responsibilities

TfL will be responsible for managing and meeting any Operational acceptance criteria required for the Solution to go Live in the TfL environment.

TfL will be responsible for operational support of the solution in their production environment.

### Estimated effort for this Use Case

Support	5
Total	5



## Operational Handover Document

Kelverion will produce an Operational Support document of not more than 20 pages detailing;

- What components make up the Solution
- How the solution operates
- The structure of the Runbook Solution as deployed by Kelverion

## Estimated effort for this Use Case

Support	5
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Total	5
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## Fourth Line Runbook Support

Each Runbook solution is customised during deployment and as such becomes bespoke to the customer and support for the Runbooks becomes a customer activity.

For Customer's looking for a formal and regular remote Orchestrator support and guidance service Kelverion offer a Call Off Support Service.

The Call Off Support Service is a flexible offering where customers engage as required to cover Runbook support issues, implementation guidance or solution design and architecture. The service is tailored to the level of support you require and the flexibility in using the time purchased.

Support contracts have for example covered:

- 1 or 2 days support every month for a 12 month term
- 8 – 10 hours call of consultancy per month on a 12 month term

As part of this SoW TfL wish to engage Kelverion to provide a 12 month Call Off Support Service providing up to 8 hrs support per month for a 12 month term.

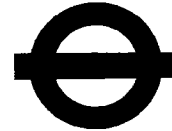
## Cost

Production System Operational Handover and Documentation  
Senior consultant delivery for the 10 days engagement on a  
Time and Materials basis is £1,290 per day including expenses

£12,903

Call Off Support Service – up to 8 hrs support per month for a 12 month term  
£9,667

All prices excluding VAT.



## Doc 2

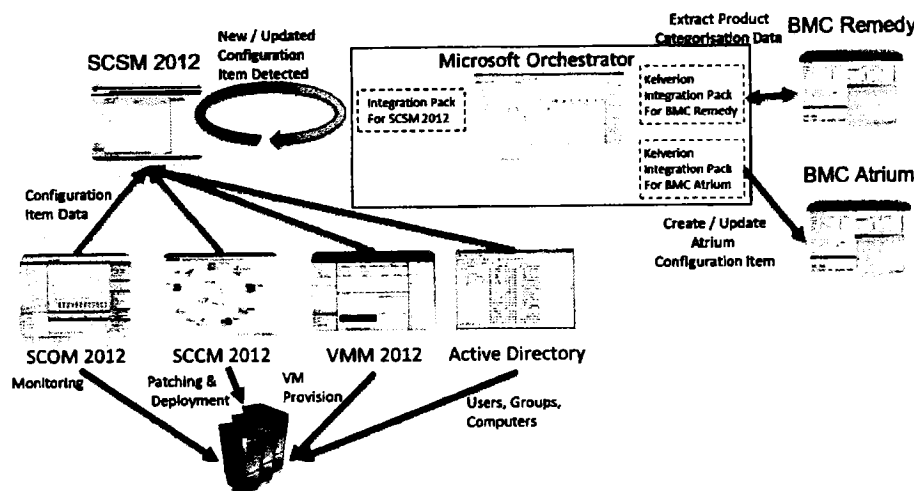
### **Project Overview**

Back in August 2014 Insight conducted a Proof Concept to demonstrate how Keverion's System Center 2012 Orchestrator driven CMDB Population Solution could be used to intelligently drive the population of TfL's Atrium CMDB.

Following successful completion of that PoC Insight now wish to move this solution into Production.

As part of move to populate BMC Atrium CMDB with System Center 2012 discovered data TfL would like to make the data import process to be more refined and intelligent and take away much of the complexity they have built into the Atrium Reconciliation Engine.

This Statement of Work details a project to implement the CMDB Population Solution in production taking source data from System Center 2012 R2 Configuration Manager, inserting that into System Center 2012 R2 Service Manager and then using this data to populate the BMC Atrium CMDB.



*Fig. 1 Solution Architecture*

Due to budgetary challenges TfL have asked Keverion to implement the solution direct into Production. Also the TfL IS Delivery team stated at a meeting in Pier Walk on the 20<sup>th</sup> February that they do not expect to have internal resources available for the installation of Orchestrator and Service Manager for the foreseeable future and as such if external resources like Keverion could install those components to accelerate the project implementation then they were happy with that approach. This SoW covers that request.

The delivery project has been broken into two phases, a fixed price Build Phase A which covers the CMDB Population solution deployment for Hardware CIs into the TfL Production environment and a Time and Materials Build Phase B which will cover Software CIs.



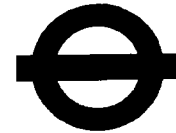
There will be break point between Phase A and Phase B. At this time TfL will evaluate the raw Software CI information available in System Center 2012 Service Manager to determine if the data as presented gives them the level of information they require. Based on this evaluation a decision on whether to proceed with Build Phase B will be taken and where the scope of Build Phase B needs to change or not.

System Center 2012 Service Manager has a number of component parts;

Service Manager part	Description
Service Manager Management Server	Contains the main software part of a Service Manager installation. You can use the Service Manager management server to manage incidents, changes, users, and tasks.
Service Manager Database	The database that contains Service Manager configuration items (CI) from the IT Enterprise; work items, such as incidents, change requests, and the configuration for the product itself. This is the Service Manager implementation of a Configuration Management Database (CMDB).
Data Warehouse Management Server	The computer that hosts the server piece of the data warehouse.
Data Warehouse Databases	Databases that provide long-term storage of the business data that Service Manager generates. These databases are also used for reporting.

The Service Manager Management Server and its database are required for Phase A, the Data Warehouse Management Server and its database would be component that may add benefit depending on what the outcome of the Phase B review and as such would be an optional part of the Phase B project.





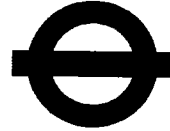
## SoW pre-requisites

- TfL must provide written approval for Keverion staff to access TfL Production Systems so that Keverion are able to deliver the solution.
- The following systems must be in place before the project can be started. The table below provides a check list for Insight to complete.

Component	Status
Microsoft SCCM R2 - production environment	
Microsoft AD – production environment	
Remedy & Atrium 8.1 – production environment	
Microsoft SQL Server or Cluster where a Keverion Database can be deployed and accessed by Orchestrator – production environment	
Server Infrastructure to host Orchestrator 2012 and Service Manager 2012	

- The following SME skills are required to successfully execute the project. The table below provides a check list for Insight to complete.

Component	Status	Resource
Microsoft Configuration Manager		
Microsoft Active Directory		
Microsoft Service Manager		
BMC Remedy		
BMC Atrium CMDB		
Microsoft SQL – to aid in installation		



## Scope of Services

### ***Build Phase A Use Cases***

The following use cases have been identified by Insight regarding automating System Center 2012 functionality:

#### Production Environment Setup and Configuration

Kelverion are required to install the Service Manager Management Server, Service Manager Database and Orchestrator systems and install and configure the necessary Orchestrator Integration Packs and Service Manager Connectors for the Solution to Operate.

It will also be necessary to create the Kelverion Database *PDS\_LIVE* which under pins the Kelverion CMDB Population Solution.

The Service Manager connector for Configuration Manager can be setup to only extract data from a specific SCCM Collection. To aid / streamline the solution testing the initial connector setup will be pointed to an SCCM collection that only contains a few devices ideally up to 10 in total. These devices should be a sample of all the type of devices TfL expect to load in BMC Atrium as part of the CMS Data Integration Project.

As part of this activity Kelverion will need to work with the Insight SMEs to setup the Service Manager connectors to Active Directory and Configuration Manager, install the Kelverion Database and look over / understand the Atrium "Staging" tables so that the build out days run to schedule.

### **Insight Responsibilities**

TfL will need to provide SQL Server infrastructure, ideally a SQL Cluster, in the Production environment to host the Service Manager, Orchestrator and Kelverion databases.

TfL will need to provide Server infrastructure in the Production environment to host the Service Manager and Orchestrator instances.

TfL will need to provide the Active Directory Service Accounts required to install the Service Manager and Orchestrator instances.

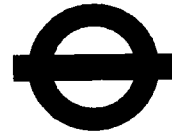
TfL will be responsible for providing a SQL SME to insist in the installation of the Kelverion Database *PDS\_LIVE*.

TfL will be responsible for providing Kelverion with access to SQL Server Management Studio so that Kelverion can view, amend and delete data help in the Production Kelverion Database *PDS\_LIVE*

TfL will be responsible for creating a new collection or identifying an existing collection in SCCM which holds the sample set of up to 10 devices to be used for the testing.

TfL will be responsible for providing a set of "staging" tables in the BMC Atrium CMDB test system for Orchestrator to populate, as detailed in section 0.

These TfL components need to be in place before the project can commence



## Estimated effort for this Use Case

Install Orchestrator	1
Configure Orchestrator	1
Install Service Manager Management Server and Service Manager Database	1
Configure Service Manager	1
Total	4

## CMDB Population of Client Asset CIs

Orchestrator will load the BMC Atrium CMDB Staging Tables and then the Atrium Reconciliation will move the data into the core BMC Asset tables.

The available data to populate the Asset information is determined by the information available via the SCCM/SCSM and AD/SCSM connectors provided by Microsoft.

Product Categorisation and Site data will be extracted from the data held in BMC Remedy.

Orchestrator will only populate those fields in the Staging Tables for which it has source data in SCSM and BMC Remedy.

- 1) Batch extract a defined subset of information about the client device estate, convert it into CI information suitable for load into the BMC CMDB, and complete the load.
- 2) Batch extract a defined subset of information about windows system and application software installed on client devices, convert it into CI information suitable for load into the BMC CMDB, and complete the load.
- 3) Repeat batch extract and load processes to update/add new information

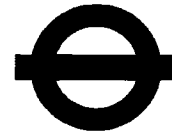
The data in System Center 2012 is held as Configuration Item (CI) Classes and these will be mapped to their equivalent BMC Atrium CI classes.

TfL have identified they want data loading into the BMC Atrium CMDB for:

- Primary CI record such as desktop or server
- Operating system that resides on the computer
- IP Address of networked device
- MAC Address of network adaptor on device
- Processor details of a computer system

## Insight Responsibilities

TfL will be responsible for defining into exactly which BMC Atrium CI Class a given Service Manager CMDB Class should be mapped and exactly what type of BMC Atrium Relationship Class should be used to related the new Atrium CIs which have been created.



## Estimated effort for this Use Case

Design	3
Build	14
Runbook testing	4
E2E integration	2
E2E Test	4
Total	27

## Build Phase B Use Cases

### Optional Atrium CMDB Population of Software Asset CIs

Orchestrator will load the BMC Atrium CMDB Staging Tables and then the Atrium Reconciliation will move the data into the core BMC Asset tables.

The available data to populate the Asset information is determined by the information available via the SCCM/SCSM and AD/SCSM connectors provided by Microsoft.

Product Categorisation will be extracted from the data held in BMC Remedy.

Orchestrator will only populate those fields in the Staging Tables for which it has source data in SCSM and BMC Remedy.

- 1) Batch extract a defined subset of information about the application software installed on client devices, convert it into CI information suitable for load into the BMC CMDB, and complete the load.
- 2) Repeat batch extract and load processes to update/add new information

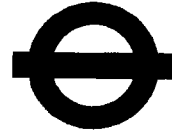
The data in System Center 2012 is held as Configuration Item (CI) Classes and these will be mapped to their equivalent BMC Atrium CI classes.

## Insight Responsibilities

TfL will be responsible for defining into exactly which BMC Atrium CI Class a given Service Manager CMDB Class should be mapped and exactly what type of BMC Atrium Relationship Class should be used to related the new Atrium CIs which have been created.

## Estimated effort for this Use Case

Design	2
Build	4
Runbook testing	1
E2E integration	1
E2E Test	2
Total	10



## Optional Installation and Configuration of Service Manager Data Warehouse

Kelverion are required to install the Data Warehouse Management Server, Data Warehouse Database systems.

### **Insight Responsibilities**

TfL will be need to provide SQL Server infrastructure, ideally a SQL Cluster, in the Production environment to host the Data Warehouse databases.

TfL will be need to provide Server infrastructure in the Production environment to host the Data Warehouse Manager Server instance.

TfL will be need to provide the Active Directory Service Accounts required to install the Data Warehouse instance.

TfL will be responsible for configuring SQL Reporting Services and SQL Analysis Services on the SQL Server which will host the Data Warehouse Database.

TfL will be responsible for insuring both Reporting Services and Analysis Services are operating correctly prior to Data Warehouse installation, otherwise the installation will fail.

TfL will be responsible for providing a SQL SME to insist in the installation of the Data Warehouse.

These TfL components need to be in place before the project can commence

#### **Estimated effort for this Use Case**

Install Data Warehouse Manager Management Server and Data Warehouse Database	2
Configure Data Warehouse	2
Total	4



## CI Loading Rules

TfL have defined a set of data loading rules to be applied when creating the CIs in the BMC Atrium CMDB. Some of these rules will be implemented using Orchestrator and some by using the BMC Atrium Reconciliation Engine and some using Remedy Reports. The table below lists the rules and which tool will implement the rules. Kolverion will only implement the Orchestrator based rules.

Ref No.	Loading Rules	Tool
1	The computer system class CI records will generally form the basis of initial population of CI records and any subsequent related records.	Orchestrator
2	The serial number of a computer system will generally form the basis of the primary identifier to enable a match between the SCCM database and Remedy database.	Reconciliation Engine
3	The minimum attributes that are required for each CI In Scope are detailed in section 1 of Appendix B (CIs In Scope).	Orchestrator
4	Relationships between records shall be imported and these are outlined in section 2 of Appendix B (CIs In Scope).	Orchestrator
5	Duplicate records shall not be created. This includes scenarios where the CI name has changed but the serial number remains the same. Also where a computer has been re-built and potentially a new SCCM GUID has been created, then a new record should not be created but instead, the existing record in Remedy shall be updated.	Reconciliation Engine
6	If a CI record has a certain status value, then certain actions shall or shall not be taken. For example if a CI record has a status of "disposed", then no update shall be made to the CI record if SCCM is presenting seemingly more up to date information. A range of scenarios is listed in section 2 of Appendix B (CIs In Scope). <b>Note:</b> Orchestrator will always report the CI status as defined by SCCM in the Staging Data set. This means that whatever the status a CI may have in the Core Dataset, TfL have the data to run reports in Remedy like "How long has an asset actually been under management whilst still marked as Being Assembled in Remedy"	Reconciliation Engine
7	People relationships shall be captured and related. SCCM shall record the Principal User of a computer system in the form of domain\username. This could be compared to the people record held in Remedy which holds the login ID of that user and then used to create a "used by" relationship.	Orchestrator
8	People relationships should only hold the Principal User detail. Previous users should be unrelated.	Orchestrator
9	Where the last scan date held in SCCM is greater than the last modified date of a CI record held in Remedy, yet the status is "not deployed", these records shall be exported into a separate report.	Remedy Report



Ref No.	Loading Rules	Tool
10	Flexibility is required for certain rules, CI Types, and product combinations. For example, where a desktop tag number can be populated using the CI name value minus the prefix, this would not be applicable to a server record which uses a different naming convention.	Orchestrator
11	CI records will only use values for product categories and product names that appear within the Remedy Product Catalogue. Where values are being presented but these do not exist within Remedy, then a report/log file needs to be created.	Orchestrator
12	CI records shall not be created with blank product categories or product name values.	Orchestrator
13	CI records shall only use values for site information that is held in a Site lookup table within Remedy. This will relate a location based on a Subnet, which itself derives from the IP address of the computer record held in SCCM.	Orchestrator
14	CI records shall not be created with a blank site if a valid entry exists in the Subnet lookup table.	Orchestrator

## ***Insight BMC Atrium, Remedy and SCCM Responsibilities***

BMC Atrium CMDB has a core data set called BMC Asset. As part of the operation of a BMC Atrium CMDB any data to be loaded into BMC Asset has to first be loaded into a set of "Staging" CMDB Tables. There is then a function with BMC Atrium called the Reconciliation Engine which executes against the data in the "Staging" tables and compares it to the data in BMC Asset. The Reconciliation Engine then detects any differences between the "Staging" data and the BMC Asset data and makes any necessary changes to the BMC Asset data set.  
Data should not be loaded.

Therefore there is a requirement on Insight to create the "staging" tables, if they don't already exist, for Orchestrator to populate and then the reconciliation process would need to operate against the data provided to process the data into the Core CMDB



tables. These tables need to be in place before Orchestrator can load the data in BMC Atrium.

TfL are responsible for configuring and managing the BMC Atrium Reconciliation Engine which will move data from the Staging tables into the Core CMDB tables.

TfL will be responsible for defining into exactly which BMC Atrium CI Class a given Service Manager CMDB Class should be mapped and exactly what type of BMC Atrium Relationship Class should be used to related the new Atrium CIs which have been created.

TfL are responsible for creating any BMC Remedy Reports required to report on Asset Status.

Insight are responsible for the setup of SCCM and that suitable client devices are being managed by SCCM to provide data in the System Center 2012 CI Classes.

Provide a SCCM SME who understands the Insight deployment of SCCM.

Provide an Atrium SME who understands the Insight deployment of BMC Atrium.

## **General Deliverables**

<b>Documentation</b>	The standard Keverion CMDB Population Solution User Guide will be provided which details how to use the solution
<b>Training</b>	<p>There are no formal training deliverables in scope of this statement of work.</p> <p>Knowledge transfer will be performed throughout the engagement. This is defined as over the shoulder watching of Keverion consultant activity during the Solution testing.</p>

## **General Responsibilities**

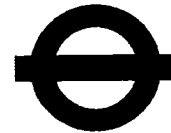
Keverion will:

- Provide experienced consulting resources for the duration of the project
- Apply quality processes throughout the project
- Make Insight aware of the status of the project at all times and raise any concerns immediately
- Keverion will implement the solution in the TfL test environment

Insight will:

- Assign a full time resource to sit with Keverion and oversee the Production system access
- Assign a single point of contact with whom all progress reporting should be directed
- Provide access to the Production environments in Data Centre as required.
- Provide access to knowledgeable Insight personnel and respond promptly to reasonable requests from Keverion for subject matter experts as required.
- Provide desk, phone and Internet Access for onsite consultants.
- Facilitate access to Insight partners where their input is required to deliver the solution
- Expedite any Insight approvals or clearance required.





## **Out of Scope Activities**

- Managing and meeting any Operational acceptance criteria required for the Solution to go Live in the TfL environment is a TfL responsibility and is out of the Kelverion scope of work.
- Kelverion will not undertake operational support of the solution in TfLs production environment.

## **Working Hours**

Kelverion consultants will work Monday to Friday, 8 hours per day, 40 hours per week. These hours will typically be worked between the hours of 9am and 6pm daily. Flexibility may be required subject to project progress. Additional hours may be worked if necessary, but only with the prior approval of Insight.

## **Acceptance and Deliverables**

The project will be considered accepted when the deliverables described in this Statement of Work have been delivered to Insight.

## **Change Control Procedure**

It is unlikely but may be necessary to amend the statement of work. In the event that the statement of work does change, the impact of such change will be estimated and clearly communicated to Insight. Insight will then decide the course of action.

## **Approach**

The general approach on this project will be to deliver the core functionality identified in this SoW first. Once the core functionality is implemented, the workflow may be refined as a result of ongoing testing and feedback.

## **Costs**

### **Build Phase A**

Senior consultant delivery for 31 days engagement on a Fixed Price basis

### **Build Phase B**

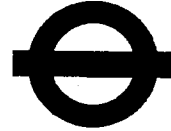
Senior consultant delivery for 14 days engagement on a Time and Materials basis

As per [redacted] senses.

### **Total cost Ex VAT**

## **Additional Requirements to meet the Scope of the RFP:-**

# Transport for London



Kelverion Integration Pack for BMC Atrium (1 production, 2 non production) includes 1<sup>st</sup> year of software maintenance

Kelverion CMDB Population Solution

Additional Requirements Total Ex Vat

## Break down Costs

Doc 1

Doc 2

Additional Costs

## 2. Charges

The Service Provider should set out the Charges for the Deliverables required, their provision and the contract model as set out in Attachment 1, taking into account that, where and to the extent applicable, the rates and mechanisms used to calculate the Charges shall not exceed the rates and shall utilise the mechanisms set out in Schedule 3 of the Framework Agreement.

A formal quotation on Company letter headed paper is required. The quotation must incorporate all ancillary costs and expenses.

The quotation must itemise the items listed in the table below.

Item	Detailed Costings
Fixed Price Services	
Products	
Licensing	
Third Line Support (as per Requirement SUP2)	
Call Off Support (as per Requirement SUP 3)	

Doc 1

# Transport for London



Production System Operational Handover and Documentation  
Senior consultant delivery for the 10 days engagement on a  
Time and Materials basis is £1,290 per day including expenses

Call Off Support Service – up to 8 hrs support per month for a 12 month term

All prices excluding VAT.

## Doc 2

### **Build Phase A**

Senior consultant delivery for 31 days engagement on a Fixed Price basis

### **Build Phase B**

Senior consultant delivery for 14 days engagement on a Time and Materials basis

At [redacted] per day including expenses.

**Total cost Ex VAT** [redacted]

## **Additional Requirements to meet the Scope of the RFP:-**

**Kelverion Integration Pack for BMC Atrium (1 production, 2 non production)**  
includes 1<sup>st</sup> year of software maintenance [redacted]

**Kelverion CMDB Population Solution** [redacted]

**Additional Requirements Total Ex Vat** [redacted]

## **Break down Costs**

**Doc 1** [redacted]

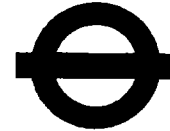
**Doc 2** [redacted]

**Additional Costs** [redacted]

## **3. Bidder to please add a suitable exit plan**

The Service Provider should detail how it plans to transfer knowledge to TfL resources, in order to ensure that TfL resources are equipped to accept handover from the Service Provider.

## **4. Service Team and Personnel**



The Service Provider should clarify the personnel and the roles they will play in delivery of the requirements.

## 5. Proposed Sub-Contractors (if any)

If the Service Provider is to be subcontracted, the main contractor (reseller) must provide a named contact who will be required to manage escalations on TfL's behalf with the Service Provider.

## 6. Other Information

The Service Provider must detail how the licensing of products will be structured, and detail this within the itemised charges described in Section 2.