**Statement of Work**

**Service Management Solution for Helseplattformen**

**Helseplattformen AS**

Prepared by: Micro Focus Professional Services

Prepared Date: April 29th 2021



STATEMENT OF WORK

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | | |  |  |
| **Project Name: Service Management Solution** | |  | | | |
| **Customer Information** | | | **Customer Billing Address** | | |
| Legal Company Name: Helseplattformen AS  Primary Contact Name: Knut Selliseth  Email: knut.selliseth@hemit.no  Phone: +47 5090890 | | | Havnegata 9  7010 Trondheim  Norway | | |
| **Delivery Location(s)** | | | **Delivery Location’s Time Zone(s)** | | |
| Havnegata 9  7010 Trondheim  Norway | | | CET – Central European Time | | |

|  |  |
| --- | --- |
| **Micro Focus Information** | |
| Contact Name: Geert van Leemput  Email: geert.vanleemput@microfocus.com | Kronborgsgrand 1  164 46 Stockholm  Sweden |

|  |  |
| --- | --- |
| **Opportunity #/Project Document ID** | **Contract # (if applicable)** |
| 0000927629 |  |
| **Engagement Summary** | |
| Service Management Solution for Helseplattformen – Implementation and Support and Maintenance Services | |

|  |  |
| --- | --- |
| **Estimated Engagement Schedule** | |
| Start Date: | October 2021 |
| End Date: | December 2024 |
| The above dates are the estimated Services schedule. Micro Focus requires a three to four week lead time after acceptance of a Customer’s purchase order in order to staff the project unless otherwise agreed.  Services are anticipated to begin and end on the dates listed above. The dates may be modified by the parties from time to time and should not be construed as a firm contractual commitment, unless otherwise specifically agreed to within this document by the parties for payment or other purposes. | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Document History** | | | |
| **Version No.** | **Version Date** | **Revised By** | **Description** |
| V1.0 | 29 April 2021 | Ben Rabau  Paolo Torrigiani  Daniel López  Erik van Busschbach  Greg Tierno |  |
|  |  |  |  |
|  |  |  |  |

Table of Contents

[1. EXECUTIVE SUMMARY 5](#_Toc70334279)

[1.1. Introduction 5](#_Toc70334280)

[1.2. Scope of Services 5](#_Toc70334281)

[1.3. Solution Overview 5](#_Toc70334282)

[1.4. Delivery Approach: AGILE 10](#_Toc70334283)

[1.5. Engagement 13](#_Toc70334284)

[1.6. Support and Maintenance Service 14](#_Toc70334285)

[1.7. Training 15](#_Toc70334286)

[2. ACCEPTANCE PROCESS 16](#_Toc70334287)

[2.1. Acceptance Tests of User Stories 16](#_Toc70334288)

[2.2. Acceptance Criteria 16](#_Toc70334289)

[2.3. Acceptance for Non-document Deliverables and Configurations 16](#_Toc70334290)

[3. PROJECT OBLIGATIONS AND RESPONSIBILITIES 18](#_Toc70334291)

[3.1. Customer Obligations 18](#_Toc70334292)

[3.2. Micro Focus’ Responsibilities 18](#_Toc70334293)

[4. CHANGE REQUEST PROCESS 19](#_Toc70334294)

[5. AGREED AND ACCEPTED 20](#_Toc70334295)

[6. APPENDIX A – SERVICES / WORK PACKAGES 21](#_Toc70334296)

[6.1. Work Package Summary List – IMPLEMENTATION 21](#_Toc70334297)

[6.2. Work Package Summary List – SUPPORT AND MAINTENANCE 23](#_Toc70334298)

[6.3. Work Packages Description – IMPLEMENTATION 23](#_Toc70334299)

[6.4. Work Packages Description – SUPPORT AND MAINTENANCE 46](#_Toc70334300)

[6.5. Training Content 47](#_Toc70334301)

[6.5.1. Introduction 47](#_Toc70334302)

[6.5.2. SMAX Jobs 47](#_Toc70334303)

[6.5.3. Education Courses’ suggested planning 48](#_Toc70334304)

[6.5.4. Recommended courses’ content - Instructor-Led 49](#_Toc70334305)

[6.5.5. Recommended courses’ content - Self-Paced (eLearning like) 51](#_Toc70334306)

[6.5.6. Education Courses’ Scope 54](#_Toc70334307)

[7. APPENDIX B – ENGAGEMENT GOVERNANCE 56](#_Toc70334308)

[7.1. Assumptions 56](#_Toc70334309)

[7.2. Roles and Responsibilities Matrix 57](#_Toc70334310)

[7.3. Engagement Structure 58](#_Toc70334311)

[7.4. Monitor & Control 58](#_Toc70334312)

[7.5. Steering Committee 59](#_Toc70334313)

[7.6. Communication Method & Meeting Cadence 59](#_Toc70334314)

[7.7. Issue Management and Escalation Process 59](#_Toc70334315)

[7.8. Quality Assurance and Risk Assessment 59](#_Toc70334316)

[8. APPENDIX C – DEFINITIONS 60](#_Toc70334317)

[8.1. Definitions 60](#_Toc70334318)

[8.2. SAFe® Definition of Done 62](#_Toc70334319)

[8.3. DoD for ‘Documents’ 63](#_Toc70334320)

[8.4. DoD for ‘Backlogs’ 63](#_Toc70334321)

[8.5. DoD for ‘Epics’ 64](#_Toc70334322)

[8.6. DoD for ‘Capabilities’ 64](#_Toc70334323)

[8.7. DoD for ‘Features’ 64](#_Toc70334324)

[8.8. DoD for ‘User Stories’ / ‘Working Software’ 64](#_Toc70334325)

## EXECUTIVE SUMMARY

### Introduction

This Statement of Work (“SOW”) is made as of the date set forth above the signatures below (“Effective Date”) by and between **Micro Focus Enterprise B.V., Amstelveen, Versoix Branch**, a wholly owned subsidiary of Micro Focus International PLC (“Micro Focus”) and Helseplattformen AS (“**Customer**”), and identifies the Professional Services (“**Services**”) Micro Focus will perform for the Customer. Handwritten or typewritten text (other than information specifically called for in the spaces provided) that purports to modify or supplement the printed text of this SOW shall have no effect and shall not add to or vary the terms of this SOW.

This SOW shall be made effective as of the last signature date (“**Effective Date**”) in the section titled Agreed and Accepted. If not executed, Micro Focus reserves the right to expire this SOW according to the expiration date of the accompanying quote, or if unspecified, thirty (30) days from the Prepared Date listed on the cover page.

### Scope of Services

This SOW is intended to provide Services as they relate to Customer’s project described in the Engagement Summary section on page 1. The Services to be provided by Micro Focus to Customer during the project are outlined in **Appendix A**.

### Solution Overview

The proposed solution will address Helseplattformen AS’s urgent need for a modern responsive Service Management tool and **offers** the end-user Self-Service, an end-user Portal with a Service Catalog, a Support Catalog and Knowledge Articles. The end-user can also see their existing requests or Chats with an Agent.

Graphical user interface, application

Description automatically generated

Figure 1 - Sample End User Portal view of SMAX

The Agents in turn have access to a responsive modern GUI supported by Artificial Intelligence and Machine Learning to resolve and fulfil the end-user tickets and requests. SMAX also includes Hot Topic Analytics for pro-active Problem Management and Smart Ticketing to predict the best categorization and routing for end-user tickets.

A screenshot of a computer

Description automatically generated with medium confidence

Graphical user interface, text, application

Description automatically generated

Figure 2 - Sample Agent Dashboard and Live Support screens of SMAX

This Statement of Work addresses the first two phases (referred to as Program Increments) which reflects the request to split the delivery into a short 8-week PILOT followed by a slightly longer Phase 2 to onboard extra Customers and integrations. After these phases Helseplattformen AS may decide to expand the usage of SMAX to cover more Customers or expand into “Auto remediation workflows” or “Automated Fulfilment” by adding calls to Runbook Automation scripts (e.g. with Operations Orchestration) from within the various catalogue offerings or ticket models task plans.

From the RFP material provided, Micro Focus has concluded that the desired scope is:

**Optimize Service Consumption and Fulfillment   
for higher user satisfaction**

Service   
Consumption

**Reduce incident volumes and response times**

* Service Support
* Incident Management
* Problem Management *(phase 2)*
* Service Levels *(phase 2)*

**Improve service operation and reduce time to resolve   
for better service quality**

* ~~Event management integration for Service Monitoring~~
* ~~Auto-remediation workflows~~

**Manage the service lifecycle   
for better governance and faster releases**

* Change Management *(phase 2)*
* ~~Asset and~~ Configuration Management *(phase 2)*

Service   
Operation

Service

Instance

Lifecycle

Service

Support

* Service & Support request
* Self Service Portal
* Unified Service & Support Catalog
* Service Levels that apply to the requests
* Knowledge Management module

Figure 3 - Scope of the Solution

The Micro Focus SMAX platform will be delivered as SaaS from our preferred long-term Norwegian partner Manag-E Nordic AS. They currently already host the HEMIT SMAX platform and deliver not only the platform but also first-line support, monitoring, operational maintenance and regular upgrades to keep up with the 3-monthly release cycle from Micro Focus.

This also makes moving the existing data and open tickets easier; the system can be cloned and updated with the new processes, data and integrations within a relatively short down-time window.

Since we are replacing the existing SMAX platform Micro Focus expects to be able to leverage some of the existing catalog items as well as the integration with Service Manager in use for HMN. This means that Micro Focus are foreseeing only a delta workshop for each of the scope items as well as leveraging the existing integration with Service Manager.

In our trusted advisor role, Micro Focus does want to point out that a more complete plan can be provided in case Helseplattformen AS would like to start over with the out-of-the-box processes and run directed design workshops to identify all the required changes for your business. This more complete plan is used as bases and has been carefully constructed from existing project experience with customers of SMAX and is therefore a more realistic plan for a full implementation where we do not take over the existing platform. The assumption in this Statement of Work is that a ‘Delta-Approach’ will allow Micro Focus and Helseplattformen AS to get a clean and efficient version of the SMAX platform, ready to be used by multiple customers.

In order to offer centralized authentication and end-to-end Service Management, the following interfaces are being envisaged:

A picture containing timeline

Description automatically generated

| Nbr. | High Level User Stories |
| --- | --- |
| 1 | As an agent working in SMAX, I want to have contact and user information for the request, incident and asset process, in order to relate persons to i.e. devices and tickets. This data needs to be present in SMAX as contacts. The source for the data is an external customer LDAP system.  OOTB OPB integration (contacts and group names from LDAP) |
| 2 | As an agent working in SMAX, I want accurate categorization data and software access-roles (e.g. SAP) available in my offerings. The source for this data is an external CSV file or Excel worksheet.  CUSTOM Connect-IT integration (import categories and roles needed to select from custom tables in SMAX) |
| 3 | As configuration manager I want my CMDB system to push CI data from my repository into SMAX, to enable the support, incident and change process there.  OOTB Native SACM integration for UCMDB via CMS Gateway |
| 4 | As process owner I want to exchange tickets with another ITSM system used by HMN  CUSTOM integration from Service Manager to SMAX via SM9 Pull Adaptor (Incident tickets) |
| 5 | As process owner I want to exchange tickets with another ITSM system used by Trondheim Municipality  CUSTOM integration via On Premise Bridge using REST API for maximum flexibility and reach  (TBC: different tickets and entities) |
| 6 | As process owner I want to exchange tickets with another ITSM system used by IBM  CUSTOM integration via On Premise Bridge using REST API for maximum flexibility and reach  (TBC: different tickets and entities) |
| 7 | As configuration manager I want my CMDB system to receive CI data from my Hopex Architecture repository to be synced from there to SMAX.  CUSTOM integration via UCMDB Dataflow Probe into UCMDB |

Figure 4 - Interfaces in scope depending on the prioritization of the Agile Backlog

In the accelerated plan we have a pilot phase where a new integration is added for the IGSI IAM solution (contacts and users) as well as a bi-directional integration towards the ServiceNow platform for Trondheim Municipality. It will be designed as such that this can be leveraged in Phase II for a second customer. Note that the implementation of the ServiceNow integration side is the responsibility of Helseplattformen AS.

The integration with ServiceNow will use the OOTB Rest API Case Exchange framework. If more error-handling is desired, e.g. if the connection to the remote system seems unreliable, then Micro Focus would advise to add the Operations Orchestration (OO) in between SMAX and ServiceNow to deal with all eventualities. This extra software offers a very flexible orchestration engine, tightly integrated in SMAX (as rules or tasks) with some 8,000 connectors including one for ServiceNow. OO would also allow Helseplattformen AS to start automating tasks for both fulfilment and remediation from within SMAX offerings and models.

This pilot phase will however be built on a refreshed version of the existing SMAX platform, which will be enhanced with UCMDB set up with an OOTB Native SACM integration to SMAX. This will future-proof the Configuration Management side of SMAX and prepare the platform for any future extensions such as Hybrid Cloud Management eXperience or Software Asset Management which are currently still out of scope.

The incident and request processes and the catalogue items will be cleaned up and enhanced as per the Workshows and the user stories that we identified and prioritized together at the start of the first phase (PILOT).

We will ensure that in this phase of the project we already think of the items of phase 2 such as service level management for request items, or the onboarding of the next Customer.

The different customers will be able to have a dedicated (different) look and feel of their portal, as well as full Data and Access Segmentation as illustrated in the figure below:

Graphical user interface, website

Description automatically generated

Figure 5 - Data and Access Segmentation for different customers or business units

In Phase 2 of the project, we will clean up the remaining processes such as service level management, problem management and change management. We will also add an interface to a second ServiceNow platform for IBM, as well as a new interface to your configuration items stored in your Hopex architecture tool.

The latter is foreseen as a one-way integration with our CMS (Universal CMDB) to extract the data from Hopex and make it available in SMAX through our native SACM integration. See also Figure 4 - Interfaces in scope depending on the prioritization of the Agile Backlog.

### Delivery Approach: AGILE

This engagement is intended to provide services as they relate to Helseplattformen AS’s SMAX engagement. The objective of this engagement is to provide Helseplattformen AS with a modern responsive Service Management tool. Helseplattformen AS’s end-users will get Self-Service via an end-user Portal with a Service Catalog, a Support Catalog and Knowledge Articles; and the Agents will get a responsive modern GUI supported by Artificial Intelligence to resolve and fulfil the end-user requests as well as Incident and Problem tickets.

The engagement will apply an Agile approach, offering short implementation cycles, that create frequent, fortnightly deliverables and constant alignment of the detailed scope with the business needs.

For Agile based engagements, Micro Focus has adopted the concepts of the leading industry standard Scaled Agile Framework (SAFe®) (<http://www.scaledagileframework.com/>, © Scaled Agile, Inc.). This framework provides the necessary structure addressing important program elements as the vision/roadmap, systems and release teams, Product- and Engagement Management, architecture as well as End-user participation.

By its nature, the detailed scope of the Agile engagement is not fixed, but will be determined in the planning week before the start of each Program Increment by prioritizing the agreed features for the Agile based implementation: the Program Backlog in which the Features and User Stories are maintained.

Micro Focus will perform towards the agreed Helseplattformen AS goals through the backlog. The joint team will agree which backlog items to address in each sprint. The sprints in the engagement will generally be executed as a series of short topical workshops with the Helseplattformen AS SMEs to create the more detailed User Stories for each of the Features that were agreed.

Helseplattformen AS will at the same time agree with their test team to create the test scripts (e.g. test data, manual test steps or automated scripts for instance for integrations). The test team will be working with the SMEs to create and plan the tests for the integrations, such as LDAP, OMi/OpsBridge, eBS and UCMDB.

Each User Story will be written in a clear business-oriented pseudo language to facilitate testing and acceptance of the User Stories and reviewed by the joint team in the Planning week:

| **Criteria ID** | **Scenarios to test** | **Criteria** | **User Story Name** |
| --- | --- | --- | --- |
| ***Functional Positive***  *(accomplish purpose when all prerequisites and integrations are present and working as expected)* | | | |
| 1 | **Scenario:** *Some determinable business situation* | **Given** *some precondition*  **And** *some other precondition*  **When** *some action by the actor*  **And** *some other action*  **Then** *some testable outcome is achieved*  **And** *something else we can check happens too*  **But** *something else we can check didn’t happen* |  |
| Example | **Scenario:** *Staff at a Hospital needs to be able to request urgent on-site help for a Network Device.* | **Given** *a Hospital requests Network Support*  **And** *requests it through the Service Portal*  **When** *they flag it as an urgent onsite issue*  **And** *they enter the Network Device ID*  **Then** *the support Agents can determine the exact location of the Network Device*  **And** *send an engineer to the correct site*  **But** *they don’t need to look in any other system* | *Location01* |

Figure 6 - User Story Pseudo Language

For each prioritized Backlog Item, a design will be made with the Agile Team and agreed with the Micro Focus Architects, to ensure that OOTB features are leveraged to their maximum potential, and advanced or complex configurations are only made for business-critical requirements.

The joint Agile team will then work on their individual tasks to achieve the backlog item and after doing some internal tests, demonstrate it to the agreed acceptance owner (For details see Appendix C) for the backlog item before handing it over to the Test team.

The approach will be to deliver a representative sample of items for each of the Features whilst enabling Helseplattformen AS staff, including Administrators or Power Users from the business, to create more of the same items. For some of the key items which are best centralized, we suggest that Helseplattformen AS creates an internal group (often referred to as a ‘Content Factory’) to create more of the same items, as shown in ‘Figure 8 - Potential plan for Content Factory activities (in dark gray) offset against the High level Agile Sprint Calendar’.

Once the first Program Increment 0 has been implemented, and SMAX is live, continuation with the Agile approach offers an excellent structure for further development of the Micro Focus Solution with its short value-based delivery cycles.

This SOW describes the scope of the services and deliverables for the preparations and two Program Increments, as they will be provided by Micro Focus in relation to the engagement:

* It is covering all activities to initiate the Agile engagement, including the creation of awareness about Agile and the implementation of the required enablers, including the hardware and software infrastructure, called the Architectural Runway.
  + Micro Focus estimates approx. 2 weeks for the initiation and Increment Planning (SP-5 - IP0)
* Once awareness and the runway have been established, this SOW also covers the initial Program Increment 0 and next Program Increment 1 with their respective Sprints. Based upon the current information Micro Focus foresees:
  + A period of approx. 8 weeks for the completion of the initial PILOT (Program Increment 0), focused on Request Management, Incident Management and Knowledge Management
  + Followed by a second Program Increment 1 of approx. 10 weeks, focused on Problem Management, Change Management and Configuration Management.

Timeline

Description automatically generated

Figure 7 - High level Agile Sprint Calendar, subject to Agile backlog prioritization

For a proposal of the potential content of each of the features, see the first level breakdown in Chapter 12 Appendix E – Proposed Planning Input. This will be used as input to the Planning of Programme Increment 0 and is subject to change based on prioritization by Helseplattformen AS.

For the engagement timeline to be achieved it is imperative that both parties complete the activities and responsibilities, detailed and agreed in the backlog.

At completion of the two Program Increments, Helseplattformen AS will have a well-defined (constrainable) Agile Environment in which next Program Increments can be executed with the in-house team, or with the support of Micro Focus (subject to a separate SOW).

We strongly advise that Helseplattformen AS stands up an in-house or partner-led team of 2 to 3 FTE that can continue to deliver “more-of-the-same” elements such as Catalog Offerings, Incident or Change Models as well as Data. Micro Focus refers to this approach as Content Factory, and this can be run in an offset fashion where the team continues outside of the project sprints, once the element has been explained in the sprints with representative samples (e.g. 10 Offerings). A potential plan could be:

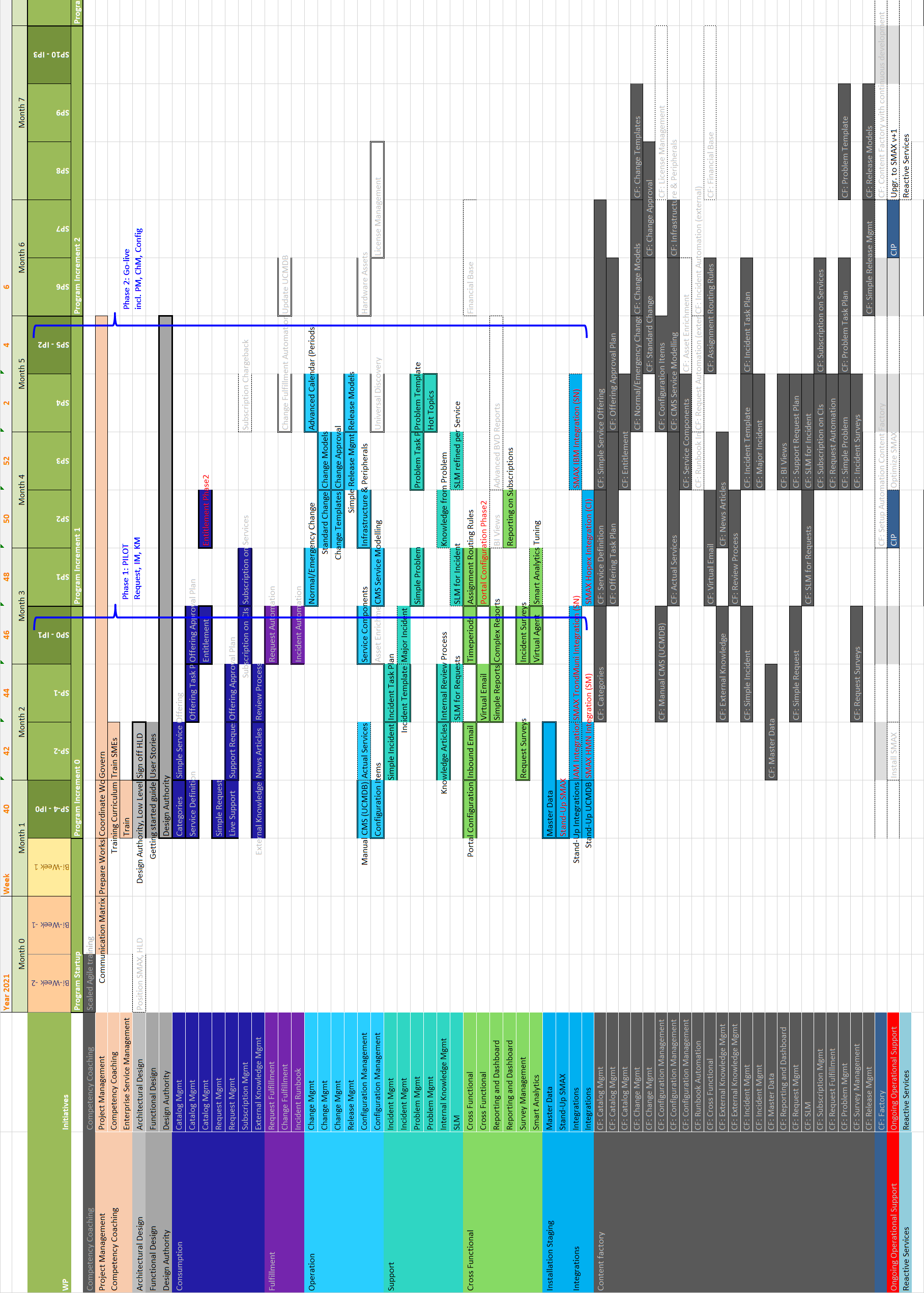


Figure 8 - Potential plan for Content Factory activities (in dark gray) offset against the High level Agile Sprint Calendar

### Engagement

The engagement will follow an approach based on Scaled Agile concepts to ensure stakeholder commitment and to help assure a prompt delivery of value in a continuous manner. The engagement will be organized as a 2-week Initiation Sprint followed by two program increments compromising of three and five Sprints which will be tasked with prioritized outputs within the two-week time box of each Sprint (i.e. every 10 working days).

The proposal is based on an assumption that the Agile Team will be staffed by three dedicated Technical Consultants and two Solution Architects from Micro Focus and at least two dedicated technicians and at least a Test lead from Helseplattformen AS, being coached by a scrum master (one of the Agile Team members). The team is guided by a Product Owner from Helseplattformen AS.

Based on the world-wide gained experience of Micro Focus Software Professional Services, their standard approach and detailed understanding of the Micro Focus Solution, Micro Focus will provide for this engagement a detailed set of tasks for the Features identified from the RFP, as a starting point to help create a viable Program Backlog. In estimating the resource capacity for this SOW, an assumed cost model for the identified tasks has been developed which forms the basis of the Agile Team Size and estimated number of Sprints for this Statement of Work.

The identified Features are:

| **Feature** | **Covering a basic set of items and enablement for** |
| --- | --- |
| **Catalog Management** | Categories, Simple and Advanced Service and Support Offerings,  including Entitlements, Approval and Task Plans |
| **Request Management** | Live Support, Requests |
| **Subscription Management** | Subscriptions on CIs and Services |
| **External Knowledge Management** | End-User Knowledge, News Articles and Knowledge Review Process |
| **Request Fulfillment** | Request Automation (internal to SMAX) |
| **Incident Run Book** | Incident Automation (internal to SMAX) |
| **Configuration Management** | CMS (UCMDB) based Service Modeling, Actual Services, Service Components, CIs as well as SMAX based Infrastructure & Peripherals |
| **Incident Management** | Simple Incidents, Templates, Task Plans and Major Incidents |
| **Problem Management** | Simple Problems, Templates and Hot Topics |
| **Internal Knowledge Management** | Agent Knowledge, Knowledge from Problems and Review Process |
| **Service Level Management (SLM)** | SLM for Request and SLM for Incidents |
| **Reporting and Dashboard** | Simple and Complex Reports, Reporting on Subscriptions and BI Views |
| **Survey Management** | Request and Incident Surveys |
| **Master Data** | Master data such as Contact, User, Groups, Locations, ... |
| **Portal Configuration** | Portal Themes per customer |
| **Stand-Up SMAX** | Installation of SMAX Tenant on SaaS, Testing |
| **Stand-Up UCMDB** | Configuration of UCMDB, CMS Gateway, Native SACM integration |
| **Stand-Up Integrations** | On-Premise Bridge, LDAP |
| **IAM Integration (IGSI)** | Uni-directional integration to IGSI for Contacts and Identity Access Management |
| **TrondMuni Integration (SN)** | Bi-directional integration to Trondheim Municipality’s ServiceNow |
| **IBM Integration (SN)** | Bi-directional integration to IBM’s ServiceNow |
| **HMN Integration (SM)** | Bi-directional integration to HMN’s Service Manager |
| **Hopex Integration (CI)** | Uni-directional integration to Services and CIs to UCMDB |

Figure 9 - Features identified during the RFP (TBC in the Workshows)

Micro Focus is confident that the above Feature list can be delivered within the two Program Increments with the Micro Focus Agile Team Size, as long as Helseplattformen AS remains committed to adopting the ‘new way of working’ that SMAX brings and contributes resources to the Agile Team.

The scope of what will be delivered in Program Increments will be guided by the Customer prioritized Features that are in decided in the Increment Planning (SP-3 – IP0) in the two weeks before the start of the initial Program Increment 0 (PILOT). During the initial Program Increment 0, estimating will be continually reviewed and refined in order to evolve more accurate estimates for future Program Increments.

The same approach will be used for the next Program Increment 1, starting with a retrospective and the prioritization of the remaining Features during the Increment Planning (SP0 – IP1).

During the Sprints, the Agile Team themselves will revisit remaining effort estimates, based on the input data and refinement of the User Stories (which are more detailed breakdown of Features). Workload will be selected according to priorities, team capacity and availability of SMEs, so that no Sprint is over-committed. Work that does not complete within the Sprint will remain in the Backlog for re-allocation by the Helseplattformen AS product owner based on the latest priorities.

The Program Backlog is a key element for the Agile implementation in which the themes, features and user-stories are maintained. It should not be considered as a fixed and closed element but a dynamic one which provides flexibility to the engagement itself.

Helseplattformen AS have agreed that the Product Backlog is maintained in the Micro Focus tool ‘ALM’ and Micro Focus will in joint effort with Helseplattformen AS review, revise and update this backlog to reflect the specifics of the Helseplattformen AS situation.

The Backlog tool acts as the communication hub and decision support system to organize, plan, and deliver the Agile engagement by empowering teams to manage their backlog with clear visibility into Development data.

### Support and Maintenance Service

Manag-E Nordic AS, partnering with Micro Focus for this engagement, delivers SMAX as a SaaS service from a data center in Oslo, to customers and users all over the world. The delivery includes a number of elements or sub-services that together make up the complete SaaS service. The list below briefly describes this:

* The software is installed, upgraded, patched (maintained) as needed, and operated continuously (24x7). The software itself is developed and delivered to Manag-E by Micro Focus, and it is also Micro Focus that develops upgrades, patches, etc. There are currently hundreds of SMAX customers in the world, and large resources are used to further develop the software continuously, with four upgrades per. year.
* The infrastructure is installed, upgraded as needed and operated continuously (24x7).
* Central to the operation is continuous monitoring, both of infrastructure and software 24x7.
* The platform on which SMAX runs has a core consisting of Docker for containers and Kubernetes as the central engine in operation. The platform is configured for high availability, with built-in failover.
* Customers normally report the solution via a form in the Manag-E Nordic service portal which is read / answered by the Service Production Department. Errors that can be solved by Manag-E are handled there, otherwise the error message is conveyed to the subcontractor.
* Errors that involve downtime for one or more customers will always be followed up via a Root Cause Analysis process, with a focus on how such errors can be avoided in the future.
* Quarterly reviews are held with the individual customer, with a report on uptime etc. for the period that passed, as well as a focus on what will happen in the future.

### Training

Training is considered in the form of **E-Learning** courses and **Instructor-led** ones.

Detailed description, course recommendations and contents can be found in 6. Appendix A, section 6.5.

## ACCEPTANCE PROCESS

### Acceptance Tests of User Stories

If Micro Focus provides a document Deliverable as part of the Services described in this SOW, each document outcome will initially be created in draft form. The Micro Focus project manager/lead consultant and the Customer’s project manager may schedule working sessions, inclusive of Micro Focus and/or Customer personnel, to refine the draft document as it is written.

When the draft document is complete, the Micro Focus’ project manager/lead consultant will submit the initial draft document for release to the Customer’s project manager for review. Customer’s Project Manager will be responsible for distributing copies of the released initial draft document for internal review.

Customer’s Project Manager will have three (3) working days to review and to return the consolidated comments to the Micro Focus Project Manager, unless otherwise agreed to by the parties.

If no revisions are received within three (3) working days, the document will be deemed accepted.

Micro Focus will review and evaluate Customer’s comments and respond in writing within three (3) working days. Customer’s comments and Micro Focus’ recommendations will be discussed and integrated within three (3) working days into a final version and delivered to Customer’s Project Manager. Delivery of the final version of a document will constitute Customer’s acceptance of the document.

### Acceptance Criteria

Acceptance will occur when the results of a Deliverable have passed the acceptance tests, at which time Customer will sign the acceptance certificate and return it to Micro Focus.

Customer shall notify Micro Focus in writing within five (5) business days of receiving the Deliverable whether it conforms to the requirements set forth in the SOW. If no response within five (5) business days, the Deliverable will be considered auto-approved.

The acceptance testing will take place according to the agreed Project Plan. Any changes to the plan will be managed under Change Management.

|  |  |
| --- | --- |
| **2.2.1. Non-Conformance Classification** | |
| **Nature of Defect** | **Severity** |
| Deliverable does not operate in accordance with the specifications listed in this SOW | Critical |
| Major Function does not work and there is no work around | Serious |
| Major Function does not work but there is a workaround | Medium |
| Minor Function defect | Low |
| Requirements for additional functionality | Enhancement |
| The thresholds for the acceptance tests are defined in terms of the allowable number and severity of non-conformances that are present in the results of the Deliverables under test. | |

|  |  |
| --- | --- |
| **2.2.2. Thresholds for Acceptance Testing** | |
| **Severity** | **Allowed Defect Levels** |
| Critical | Zero |
| Serious | Zero |
| Medium | 5 with Action Plan in place |
| Low | Any number as long as there is an agreed Action Plan |
| Enhancements | Change Request Procedure |
| Micro Focus has the responsibility to:   * + Evaluate the non-conformance information provided by Customer;   + Provide an Action Plan to correct defects of Medium severity within a mutual agreed timeframe after Customer provides written acceptance of the Deliverable and correct said defects; and   + Use commercially reasonable endeavors to correct defect levels of Low severity within a reasonable timeframe Customer accepts the Deliverable. | |

### Acceptance for Non-document Deliverables and Configurations

Micro Focus will notify Customer when a non-document Deliverable and/or Configuration is ready for acceptance testing. Upon such notification, Customer shall make available all personnel and systems necessary to perform acceptance testing in a timely manner.

If the acceptance tests demonstrate that the non-document Deliverable and/or Configuration meets the acceptance criteria, then the Customer shall provide written notification to Micro Focus that the Customer accepts the non-document Deliverable and/or Configuration within **5** working days and acceptance is thereby achieved.

If the acceptance tests demonstrate that the non-document Deliverable and/or Configuration fails to meet the acceptance criteria then the Customer shall notify Micro Focus in writing, within **5** working days (or such other time period as otherwise agreed by the parties in writing in respect to a particular non-document Deliverable and/or Configuration) after the acceptance tests have been completed, of the details of how the non-document Deliverable and/or Configuration failed to meet the acceptance criteria.

Micro Focus shall, within a reasonable time period after receipt of the Customer’s notification, correct any such non-conformance so that the non-document Deliverable and/or Configuration (as modified) meets the acceptance criteria and resubmit the non-document Deliverable and/or Configuration (as modified) for a repetition of the acceptance tests. If such repeat tests meet the acceptance criteria then the Customer shall provide written notification to Micro Focus that the Customer accepts the non-document Deliverable and/or Configuration and acceptance is thereby achieved.

Where the non-document Deliverable and/or Configuration (as modified) does not pass the acceptance tests, the Customer may elect to:

1. Agree on a new date to conduct an additional acceptance tests for the affected non-document Deliverable and/or Configuration. If the non-document Deliverable and/or Configuration fails such additional tests, then Customer shall be entitled to:
   1. Accept the non-document Deliverable and/or Configuration on an “as-is” basis, subject to a reasonable price adjustment to be agreed by the parties, or
   2. Return the affected non-document Deliverable and/or Configuration and associated documentation to Micro Focus and receive a refund of the amounts paid to Micro Focus for such non-conforming non-document Deliverable and/or Configuration.
2. Acceptance of the non-document Deliverable and/or Configuration shall be deemed to have occurred on whichever is the earliest of:
   1. Customer provides written confirmation the non-document Deliverable and/or Configuration is accepted or
   2. Expiration of five (5) working days after the completion of the relevant acceptance tests, and the Customer does not notify Micro Focus in that time of any objectively verifiable non-compliance with the relevant acceptance criteria, or
   3. Use of the non-document Deliverable and/or Configuration by Customer, in any manner, including putting the non-document Deliverable and/or Configuration into production.

Notwithstanding the foregoing, Configurations provided to Customer under this SOW shall be deemed accepted if Customer starts using the Configurations in a production environment, provided, however that such acceptance shall not affect Customer’s rights under the warranty provisions in the Agreement.

Notwithstanding any other term in this SOW or the Agreement, the acceptance procedures described above (and any associated warranty terms) do not apply to Products, even if they can be used in connection with the Services or Deliverables provided under the governing terms of this document. “Products” as used abovemeans hardware or software listed in Micro Focus' standard price list at the time of Micro Focus' acceptance of Customer’s order, including Products that are modified, altered, or customized to meet Customer requirements.

<<Insert Testing Section>>

## PROJECT OBLIGATIONS AND RESPONSIBILITIES

This section describes Customer’s and Micro Focus’ general responsibilities relative to this SOW. Specific responsibilities are detailed in the description of each Work Package. Micro Focus’ ability to fulfil its responsibilities relative to this SOW is dependent upon Customer fulfilling the Customers Responsibilities described below and elsewhere within this document.

### Customer Obligations

1. Assign a Project Sponsor who:
   1. Is available to Micro Focus personnel for the life of the project.
   2. Acts as an escalation point when conflicts cannot be resolved by the Project Manager.
2. Purchase or provide all hardware, software licenses, staff, current maintenance contracts, and environments necessary for Micro Focus to provide these services. Micro Focus will provide laptops with standard client software for its consultants.
3. It is assumed that the delivery of the project will be predominantly from Customer’s premises. Customer will provide Micro Focus personnel access to building facilities, computer room facilities, systems, passwords, etc., as needed, during normal business hours as well as after hours, if needed. If systems credentials or systems access is delayed or incomplete, any services necessary to correct problems created thereby shall be treated as a Customer requested Change Request and subject to the Change Request process in Section 4.
4. Provide systems support including, but not limited to, Network Administration, System Administration, Security Administration and Database Administrator as needed for Micro Focus Software installation, configuration and deployment verification. Systems support personnel should supply all necessary pre-requisites including system access and permissions identified together with Micro Focus Software specialists prior to Micro Focus Software installation. Internal systems support processes should be ready to handle efficiently potential changes requested in the process of Micro Focus Software deployment.
5. Perform any backups to applicable systems, as deemed necessary by Customer (1) prior to performance of Micro Focus Services and (2) during the engagement to retain work performed by Micro Focus under the governing terms of this document.
6. Provide accurate, complete and timely information, business and technical data or documentation as requested by Micro Focus to perform the Services.
7. Customer will provide a stable platform/environment, which is fully functional and useable, e.g. the software can be used reliably and consistently. This is assumed to be a Customer led activity provisioning all hardware, operating system and database for the environments required.
8. Customer is responsible for the management of change within their organization. Micro Focus may be contracted to provide assistance in fulfilling this Customer obligation.
9. During the provision of the Services contemplated in this SOW, Micro Focus may be required to install copies of third party or Micro Focus branded software and will be required to accept license terms accompanying such software on behalf of Customer. It is Customer’s responsibility to review such license terms at the time of installation, and Customer hereby authorizes Micro Focus to accept such license terms on its behalf.
10. If Micro Focus’ performance under this SOW depends upon services, hardware or software being supplied by third parties, Customer is responsible for obtaining all such third-party hardware, software, and consulting services, which are a prerequisite or dependency to Micro Focus’ performance under this SOW. Customer is also responsible for any such third-party product and/or service charges and fees.
11. If these obligations are performed incompletely, faulty or not on time, all corrective measures by Micro Focus shall be treated as a Customer requested Change Request and subject to the Change Request process in Section 4.

### Micro Focus’ Responsibilities

1. Provide a single point of contact to Customer during the provision of Services described in this SOW for coordination and scheduling of project tasks, documentation, and any changes to scope requiring a Change Request.
2. Perform the Services and provide the Deliverables and/or Configurations described within this document.

## CHANGE REQUEST PROCESS

Change Requests will be processed as soon as is commercially reasonable. The change will be evaluated and any project impact will be identified. The cost, scope, and schedule impact, if any, of the change will be analyzed and documented by Micro Focus utilizing a Change Request Form. The change impact will then be processed for Customer authorization or closure.

All Change Requests must be mutually agreed by the parties. Pending such agreement, Micro Focus will continue to perform and be paid as if such Change Request had not been requested or recommended, provided that if either party proposes a Change Request which, in Micro Focus’ judgment, represents a material change in the Services or Deliverables and such Change Request remains outstanding for thirty (30) days or is rejected by Customer, Micro Focus will have the right to terminate the affected SOW.

1. Change Requests will include the following:
2. A description of any additional Services to be performed and/or any changes to the performance required of either party.
3. Statement of the impact of additional Services or changes to the scope of the SOW.
4. The estimated timetable for completion of the Services specified in the Change Request and the impact, if any, on pricing and payments.
5. Specific roles and responsibilities affected by the Change Request will be identified when applicable.
6. The documentation to be modified or supplied as part of the additional or changed Services.

## AGREED AND ACCEPTED

Based on the information available during the creation of this SOW, Micro Focus will provide the Services defined above for a fixed price of **<<***input PRICE***>>** **(“Spending Authority”)**.

In addition to Customer’s execution of this SOW, Micro Focus shall require a valid acceptable Purchase Order (“**PO**”) referencing this SOW in the amount of the Spending Authority to enable Micro Focus to begin performing Services under the Governing Terms of this SOW and Customer represents that its execution of this SOW is a binding commitment to purchase the Micro Focus Services described within this document. Customer agrees that the pre-printed terms of the PO shall not apply.

**OR**

Customer confirms that a Purchase Order (“**PO**”) will not be issued for this signed SOW and Governing Terms referenced within this document for the **<<***input Project Name***>>**. The signed SOW and Governing terms will serve as a PO and constitutes authorization of the Spending Authority to enable Micro Focus to begin performing Services. Both parties will use Micro Focus’ reference number **<<***input SOW ID***>>** for all correspondence relating to this commitment of work. Customer will accept delivery of Services and provide payment as agreed in this signed SOW and Governing Terms attached.

|  |  |
| --- | --- |
| **<<Input Customer’s Name>>** | **Micro Focus** |
| Authorized Signature: | Authorized Signature: |
| Printed Name: | Printed Name: |
| Title: | Title: |
| \*Date: | \*Date: |

\*This SOW shall be effective as of the last signature date (the “Effective Date”).

## APPENDIX A – SERVICES / WORK PACKAGES

|  |
| --- |
| **SERVICES / WORK PACKAGES** |

This section defines all the Work Packages to be provided by Micro Focus during the project, subject to the outcome of the Workshop(s).

The specific activities and expected outcomes that are supported by this work package should be documented and managed via an appropriate backlog, but a flavour of what can be expected is listed below:

### Work Package Summary List – IMPLEMENTATION

|  |  |  |  |
| --- | --- | --- | --- |
| ***WORKSTREAM*** | **WP ID** | **WORKPACKAGE**  **NAME** | **WORKPACKAGE**  **DESCRIPTION** |
| IMPLEMENTATION | IMPL-01 | Project Management | Governance of the planning, execution, controlling, and closing of the project |
| IMPL-02 | Competency Coaching | Training for the Agile team(s) members |
| IMPL-03 | Architectural Design | Definition of the solution architecture |
| IMPL-04 | Functional Design | Definition of the User Stories and Backlog with prioritization |
| IMPL-05 | Design Authority | Validation of the User Stories and Backlog from an architectural and functional perspective |
| IMPL-06 | Stand-Up SMAX | Setup of the new SMAX Tenant and installation/configuration of the necessary solution components (OPB agent, ConnectIT) |
| IMPL-07 | Master Data | SSO integration and foundation data configuration |
| IMPL-08 | Integrations | Implementation of integrations as described in solution design. It will include:   * UCMDB * SMTP * IAM * Service Manager (HMN) * ServiceNow (Trondheim Municipality) * ServiceNow (IBM) * Hopex |
| IMPL-09 | Catalog Management | Configuration of the service catalog offerings, categories, assignments and approvals |
| IMPL-10 | Request Management | Configuration of support requests with related notifications, business rules and task plans |
| IMPL-11 | Subscription Management | Configuration of service offering subscriptions for assets and services |
| IMPL-12 | External Knowledge Management | Configuration of the knowledge base for end users, articles creation/import (knowledge and news) and implementation of articles lifecycle |
| IMPL-13 | Request Fulfillment | Implementation of fulfillment plans for request automation |
| IMPL-14 | Incident Runbook | Implementation of task plans for incident automation |
| IMPL-15 | Change Management | Configuration of the change processes (normal, emergency and standard) with related models, templates and approvals |
| IMPL-16 | Release Management | Configuration of the release management process |
| IMPL-17 | Configuration Management | Implementation of service model. Configuration of Cis for services, components and infrastructure |
| IMPL-18 | Incident Management | Configuration of incident and major incident processes |
| IMPL-19 | Problem Management | Configuration of problem management process |
| IMPL-20 | Internal Knowledge Management | Configuration of the knowledge base for agents, articles creation from problems and implementation of articles lifecycle |
| IMPL-21 | SLM | Configuration of SLAs and OLAs for requests, incidents and services |
| IMPL-22 | Cross Functional | Configuration of platform capabilities shared by different processes:   * Portal branding * Inbound emails * Assignment rules |
| IMPL-23 | Reporting and Dashboard | Creation of simple and complex report leveraging platform capabilities |
| IMPL-24 | Survey Management | Configuration of surveys for request and incident processes |
| IMPL-25 | Smart Analytics | Configuration of Virtual Agent and smart capabilities tuning |
| DIGITAL TRANSFORMATION | SDX-01 | OPTIONAL – SMART DX | This is an optional add-on work package.  The purpose is to strengthen Helseplattformen competency to simplify, streamline and automate customer journeys across all service offerings.  This is based on the Micro Focus SMART DX (digital transformation) approach: a high-impact yet practical approach to integrated service life-cycle management. Developed in close collaboration with our global clients, yet grounded in industry frameworks such as SAFe 5.0 and IT4IT™.  SMART DX primary focus is on enhancing Helseplattformen current service portfolio management and architecture governance competency. |
| CONSULTANCY SERVICES | CS-01 | OPTIONAL – Consultancy Services | This is an optional add-on work package.  Consultancy Services during Support and Maintenance period |

### Work Package Summary List – SUPPORT AND MAINTENANCE

|  |  |  |  |
| --- | --- | --- | --- |
| ***WORKSTREAM*** | **WP ID** | **WORKPACKAGE**  **NAME** | **WORKPACKAGE**  **DESCRIPTION** |
| SUPPORT AND MAINTENANCE | SUPP-MNT | Support & Maintenance Services | Support and Maintenance Services, to ensure the solution is available, accessible, responsive and working as designed. |

### Work Packages Description – IMPLEMENTATION

|  |  |
| --- | --- |
| ***IMPL-01*** | **Project Management** |
| ***Activities*** | **Communication Matrix:**   * Define stakeholders and communications plan   **Prepare Workshows:**   * Plan the Workshows, including location, attendance and materials   **Coordinate Workshows:**   * Coordinate the Workshows, including single point of contact, ensuring location access, tracking attendance, distribution of materials, taking of notes and organizing follow ups   **Govern:**   * Continuously monitor the quality of delivery * Draft further project schedule in close cooperation with customer * Monitor project progress, create and present on a regular basis progress reports and timesheets * Manage Resources according to the plan * Manage communication and be SPOC for project management related questions * Perform ongoing Risk Management and early communications on issues * Continuously monitor project budget and frequently report on budget consumption |

|  |  |
| --- | --- |
| ***IMPL-02*** | **Competency Coaching** |
| ***Activities*** | **Training Curriculum:**   * Facilitate an up to Four (4) hour workshop with the customer stakeholders for the education needs analysis and approach.   **Scaled Agile training:**   * Facilitate an up to Forty Three (43) hour training sessions with the customer stakeholders to train them in the tool approach and functionality.   **Train SMEs:**   * Facilitate an up to Thirty Five (35) hour training sessions with the customer SMEs to train them in the configuration and maintenance of the tool. |
| ***Assumptions*** | * OOTB Scaled Agile training |
| ***Customer’s Responsibilities*** | * Ensure all members of the Agile team(s), testers and product/process owners are available |
| ***Pre-Requisites*** | * Stakeholders are briefed in the company's goals and intentions for SMAX |

|  |  |
| --- | --- |
| ***IMPL-03*** | ***Architectural Design*** |
| ***Activities*** | **Sign off HLD:**   * Facilitate up to One (1) hour remote session with customer Stakeholders to sign off the overall HLD (environment and connectivity)   **Design Authority, Low Level Design (LLD):**   * Design authority checks of all changes that have impact on the environment architecture to keep the customer as secure and close to OOTB and as future proof as possible |
| ***Outcomes*** | * Agreed HLD drawing |
| ***Customer’s Responsibilities*** | * Stakeholders, architects and SMEs signoff (remote meeting) |

|  |  |
| --- | --- |
| ***IMPL-04*** | ***Functional Design*** |
| ***Activities*** | **User Stories:**   * Facilitate up to Four (4) hour work sessions with customer Stakeholders to start creating the User Stories in the appropriate format * Help the customer create the Users Stories for at least the first program increment; written using pseudo-language, testable and ready for inclusion in the backlog. * Prioritize and Plan the User Stories for the initial Program Increment |
| ***Outcomes*** | * User Story and Backlog template (depending on Backlog tool) |
| ***Customer’s Responsibilities*** | * Getting Prioritized User Stories in the Backlog for at least the initial Program Increment * Prioritized Initial Backlog for the initial Program Increment |
| ***Pre-Requisites*** | * Agreed Backlog tool |

|  |  |
| --- | --- |
| ***IMPL-05*** | ***Design Authority*** |
| ***Activities*** | **Design Authority:**   * Design authority checks all new Features and User Stories for functional and architectural impact to keep the customer as close to OOTB and as upgradeable as possible * The Design authority also checks for any environmental architecture impact * If required, the Design authority will meet with the SMEs and Agile team to come up with better alternatives |

|  |  |
| --- | --- |
| ***IMPL-06*** | ***Stand-Up SMAX*** |
| ***Activities*** | **Stand-Up SMAX:**   * Clone/install new SMAX tenant in SaaS * Run SMAX system platform test and platform health check. Record start and stop procedure with screenshots and solve any issues * Certify SMAX Installation with health check * Verify base functionality as login to SMAX, logout, access SMAX service portal and access SMAX integration page * Download and install One (1) OPB agent as described in documentation for current software release and record installation with screenshots and register it to SMAX as agent * Download and install One (1) Connect IT instance as described in documentation for the current software release and record installation with screenshots * Verify base functionality as registration of the OPB to SMAX and connection from Connect IT to SMAX and solve any issues |
| ***Outcomes*** | * System Test Screen Recording * Installation Screen Recording |
| ***Configuration*** | * OPB Agent installed * Connect IT installed * SMAX new tenant installed |
| ***Assumptions*** | * Portal can be accessed from a typical end user workplace * Administration can be accessed from a typical administrator workplace * Existing SMAX installation available * All installations succeeded |
| ***Customer’s Responsibilities*** | * Provide one typical end user and one typical administrative user workplace for connection test * Provide access to the virtual machine and network components as described in documentation of the current software release for On Premise Bridge * Provide access to the virtual machine and network components as described in documentation of the current software release for Connect IT * Provide the expected amount of concurrent logins Provide the expected amount of client using the portal Provide the expected amount of requests * Provide file access. Make sure SME can connect to the internet * Provide the configuration items needed as described in documentation for the current software release like DNS, certificate, … |
| ***Out of Scope*** | * Sizing recommendations for surrounding system * Preparation of systems not in scope of SMAX platform * Any other software package beside described in activities |
| ***Pre-Requisites*** | * Agreed time frame for the installation, to make assumptions of the software release |

|  |  |
| --- | --- |
| ***IMPL-07*** | ***Master Data*** |
| ***Activities*** | **Master Data:**   * Facilitate an up to Four (4) hour work session with customer SME to fill in the import template for organizational groups and record them in SMAX load template * Configure the On Premise Bridge (OPB) LDAP endpoint to load and synchronize LDAP person data from customer directory as described in documentation for current software release and record installation with screenshots * Configure Single Sign On for SMAX in SMAX administrative UI. * Verify the synchronization of LDAP person records and solve any issues * Verify the single sign on capability and solve any issues * Configure up to Ten (10) functional groups for administrative purpose Add test users to administrative group * Configure up to Ten (10) functional groups for end user testing purpose Add test users to end user group * Configure IDM connection to customer LDAP/AD directory for authentication as described in documentation for current software release and record installation with screenshots * Facilitate an up to Four (4) hour work session with customer SME to identify company and organization records that reflect the organizational chart and record them in SMAX load template * Configure the organization and company structure * Verify with customer SME the company and organizational unit records and solve any issues * Migrate the company and organizational units as defined * Continuously load company or organizational records as requested * Verify portal access with test administrators and test users and solve any issues * Continuously define more fields to be mapped for person data synchronization |
| ***Outcomes*** | * SMAX import template * Installation Screen Recording |
| ***Configuration*** | * LDAP endpoint configured * SSO capability configured * Configured test user * LDAP/AD connection for Authentication * Configured companies and organizational units |
| ***Assumptions*** | * The selected SSO capability is supported by official SMAX matrix |
| ***Customer’s Responsibilities*** | * Provide organizational group records and make sure the right customer SME attends the session * Provide filter clause for the directory query to prevent loading all objects * Provide access to the corresponding authentication systems * Provide filter clause for the directory query to prevent loading all objects * Provide the necessary organizational chart and make sure SME attends the session. |
| ***Out of Scope*** | * Single Sign On or other authentication mechanism as SAML, Kerberos and others not described in activities * Other users and group than created manually |

|  |  |
| --- | --- |
| ***IMPL-08*** | ***Integrations*** |
| ***Activities*** | **Stand-Up UCMDB:**   * Facilitate an up to Four (4) hour work session with customer SME to gather data necessary for the preparation of the configuration and the test plan and record them in SMAX requirements * Configure new UCMDB tenant in SaaS * Verify base functionality as login to UCMDB, logout, access UCMDB UI and access LDAP authentication and solve any issues * Configure LDAP authentication for UCMDB GUI and verify with customer SME and solve any issues   **Stand-Up Integrations:**   * Configure One (1) outgoing SMTP connection * Verify outgoing Emails with two test users and solve any issues   **SMAX IAM Integration (IGSI):**   * Configure the ConnectIT (CIT) LDAP scenario to load and synchronize LDAP person data from customer directory as described in documentation for current software release and record installation with screenshots * Verify the synchronization of LDAP person additional data records and solve any issues * Facilitate an up to Four (4) hour work session with customer SME to fill in the import template for functional groups and record them in SMAX load template * Facilitate an up to Four (4) hour work session with customer SME to fill in the import template for contacts and record them in SMAX load template * Load One Hundred (100) records from SMAX load template into system * Configure the synchronization between SMAX person data and customers directory as defined in design. Create a scenario in ConnectIT and add the default mapping. * Verify the master data load by selecting up to five records and solve any issues * Facilitate an up to Two (2) hour work session with customer SME to understand and design the base mapping and up to Five (5) additional fields from directory system needed in SMAX and record gaps in SMAX gap template * Configure the mapping and synchronization of up to Five (5) additional fields as defined in design   **SMAX HMN Integration (SM):**   * Facilitate an up to Eight (8) hour work session with customer SME to understand and design the SM9 Case Exchange and up to Two (2) additional fields from HMN SM needed in SMAX and record gaps in SMAX gap template * Configure the SMAX case exchange synchronization via SM and up to Two (2) additional fields as defined in design * Verify the case exchange by exchanging up to Five (5) records and solve any issues   **SMAX Trondheim Municipality Integration (SN):**   * Facilitate an up to Sixteen (16) hour work session with customer SME to understand and design the first ServiceNow Case Exchange and up to Four (4) additional fields with Trondheim Municipality needed in SMAX and record gaps in SMAX gap template * Facilitate an up to Sixteen (16) hour work session with customer SME to design the integration flows and document the design * Configure the SMAX case exchange synchronization and up to Four (4) additional fields as defined in design * Configure the case exchange logic as described in the design document * Verify the case exchange by exchanging up to Ten (10) records and solve any issues   **SMAX IBM Integration (SN):**   * Facilitate an up to Twelve (12) hour work session with customer SME to understand and design the second ServiceNow Case Exchange and up to Four (4) additional fields from IBM ServiceNow needed in SMAX and record gaps in SMAX gap template * Facilitate an up to Eight (8) hour work session with customer SME to design the integration flows and document the design * Configure the SMAX case exchange synchronization and up to Four (4) additional fields as defined in design * Configure the case exchange logic as described in the design document * Verify the case exchange by exchanging up to Ten (10) records and solve any issues   **SMAX Hopex Integration (CI):**   * Facilitate an up to Sixteen (16) hour work session with customer SME to understand and design the Hopex Integration and up to Eight (8) additional CI fields from Hopex needed in SMAX and record gaps in SMAX gap template * Facilitate an up to Eight (8) hour work session with customer SME to design the UCMDB Probe-logic and document the design * Configure the SMAX CI synchronization via UCMDB and up to Four (4) additional fields as defined in design * Configure the UD Integration to load and synchronize CI data from customer MDR as described in the design document * Verify the CI integration by exchanging up to Two Hundred (200) records and solve any issues |
| ***Outcomes*** | * SMAX requirements template * Design Document for HMN Service Manager case exchange * SMAX import template * SMAX gap template for Trondheim Municipality ServiceNow case exchange * Design Document for Trondheim Municipality ServiceNow case exchange * SMAX gap template for IBM ServiceNow case exchange * Design Document for IBM ServiceNow case exchange * SMAX gap template for Hopex * Design Document for UCMDB/Hopex integration * Custom Fields for Hopex integration * CI Integration from Hopex |
| ***Configuration*** | * UCMDB Platform configured * LDAP authentication configured * LDAP scenario configured * HMN integration configured * Configured SMTP outbound * Configured base person data scenario * Configured enhanced person data scenario * Master Data loaded * Trondheim Municipality ServiceNow integration configured * Trondheim Municipality ServiceNow interface logic configured * IBM ServiceNow integration configured * IBM ServiceNow interface logic configured * CI Integration configured |
| ***Assumptions*** | * UCMDB tenant configuration succeeded * This integration can be based on the existing SMA/SM interface currently used * The customer side of the interface will be altered by the responsible party outside of this SOW * SMTP outbound succeeded * The selected SSO capability is supported by official SMAX matrix |
| ***Customer’s Responsibilities*** | * Make sure the right customer SME attends the session * Provide the expected amount of concurrent logins Provide the expected amount of client using the portal Provide the expected amount of requests * Provide file access. Make sure SME can connect to the internet * Provide access to and credentials for authentication source (LDAP) * Make sure the right customer SME attends the session for HMN Service Manager * Coordinate the configuration of the remote system: HMN Service Manager * Provide access to and credentials for SMTP server * Provide filter clause for the directory query to prevent loading all objects * Provide functional group records and make sure the right customer SME attends the session * Provide support desk members and contacts and make sure the right customer SME attends the session * Provide the necessary credential information for directory access and make sure SME attendees the session. * Provide the process design and make sure the right customer SME attends the session * Provide the necessary credentials information for directory access and make sure SME attendees the session. * Make sure the right customer SME attends the session for Trondheim Municipality ServiceNow * Coordinate the configuration of the remote system: Trondheim Municipality ServiceNow * Make sure the right customer SME attends the session for IBM ServiceNow * Coordinate the configuration of the remote system: IBM ServiceNow * Make sure the right customer SME attends the session for Hopex * Coordinate the configuration of the remote system: Hopex * Sign off CI data loads |
| ***Out of Scope*** | * Sizing recommendations for surrounding system * Any configuration on the API Gateway * Other field mapping then defined in SMAX person data documentation * Any configuration on the API Gateway * Any configuration on any Hopex-frontend Service Bus side * Any configuration on the Service Bus side |
| ***Pre-Requisites*** | * Documentation of the SM system and existing integration * Documentation of the Trondheim Municipality ServiceNow system and integration capabilities * Documentation of the IBM ServiceNow system and integration capabilities * Documentation of the Hopex system and integration capabilities |

|  |  |
| --- | --- |
| ***IMPL-09*** | ***Catalog Management*** |
| ***Activities*** | **Categories:**   * Facilitate an up to Four (4) hour work session with customer SME to design up to Twelve (12) categories for the service catalog and record them in SMAX template * Configure up to Twelve (12) categories * Verify the up to Twelve (12) categories with the customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: add more categories as requested   **Entitlement:**   * Facilitate an up to Two (2) hour work session with customer SME to help the customer to understand the organizational entitlement and record gaps in SMAX gap template * Configure up to Two (2) entitlements for two different organizational groups for the service catalog * Verify the entitlements with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more entitlements as requested   **Service Definition:**   * Facilitate an up to Four (4) hour work session with customer SME to design the service definitions for the service catalog based on categories and record them in SMAX template * Import up to Twenty (20) service definitions as defined in SMAX template * Verify the service definitions with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: load and configure more service definitions as requested by customer   **Offering Task Plan:**   * Facilitate an up to Two (2) hour work session with customer SME to understand the detail process for up to Five (5) service offerings. Convert manual steps to manual task plan steps and record gaps in SMAX gap template * Facilitate an up to Four (4) hour work session with customer SME to understand the approval process for up to Five (5) service offerings with task plans and record gaps in SMAX gap template * Configure up to Five (5) service offering with manual task plans as designed * Configure up to Five (5) service offering with approvals as designed * Verify the service offerings with manual task plans and solve any issues * Verify the service offerings including approvals with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Content Factory: configure more manual task plans as requested * Content Factory: configure Task plans and models as requested   **Simple Service Offering:**   * Facilitate an up to Two (2) hour work session with customer SME to design up to Five (5) service offerings and record gaps in SMAX gap template * Facilitate an up to One (1) hour work session with customer to design the assignment groups and expert groups for up to Five (5) service offerings and record gaps in SMAX gaps template * Facilitate an up to Two (2) hour work session with customer SME to design up to Two (2) notifications and business rules for service offering and record gaps in SMAX gap template * Configure up to Five (5) service offerings as defined in SMAX requirements Template * Configure up to Five (5) assignment groups and expert groups as designed * Configure the up to Five (5) notifications and process rules as designed * Verify the up to Five (5) service offerings with customer SME and solve any issues * Verify assignment groups and experts for service offerings as designed and solve any issues * Verify the up to Five (5) notifications and process rules with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more service offerings as requested by customer * Content Factory: configure more assignment groups and experts as requested by customer * Content Factory: load and configure more process rules and notification templates as requested by customer   **Offering Approval Plan:**   * Facilitate an up to Four (4) hour work session with customer SME to understand the re-usable approval plans processes for up to Ten (10) service requests and record gaps in SMAX gap template * Configure up to Ten (10) service request models with approval as designed * Verify the up to Ten (10) service request models with approval with two test users and two test approvers and resolve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more offerings with approvals as requested * Content Factory: configure Task plans and models as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Categories configured * Configured entitlements * Configured service definitions * Configured service offerings * Imported catalog data * Configured assignment groups and expert groups * Configured service request models (Fulfillment plan) |
| ***Assumptions*** | * SMAX service definition template * Service offerings with task plan configured * Service offerings with approval configured * No automation to be configured in this phase * SMAX requirement sheet * No automation to be configured in this phase * Service request models configured * Configured service request models (Fulfillment plan) in DEV |
| ***Customer’s Responsibilities*** | * Provide the categories prepared for the service catalog and make sure the right customer SME attends the session * Provide the service definitions prepared for the service catalog and make sure the right customer SME attends the session * Provide the detail process for catalog offerings and make sure the right customer SME attends the session * Provide the detail process for catalog offering approvals and make sure the right customer SME attends the session * Provide the catalog item information prepared for the service catalog and make sure the right customer SME attends the session * Customer SME to verify the data import * Provide the notifications and process rules for service offerings and make sure the right customer SME attends the session * Make sure the right customer SME attends the session and provides two test user accounts * Provide possible re-usable procedures and make sure the right customer SME attends the session |
| ***Out of Scope*** | * Service offerings that are planned for automation * Service requests that are planned for automation |

|  |  |
| --- | --- |
| ***IMPL-10*** | ***Request Management*** |
| ***Activities*** | **Simple Request:**   * Configure the notifications and process rules as designed for support request in SMAX requirement template * Verify with customer SME and two sample end users the process of ordering and processing a support and solve any issues * Facilitate an up to One (1) hour work session with customer SME to help understand simple request management and live support capability and record in ART * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Configure up to Five (5) notifications and business rules for support requests and solve any issues * Verify the notifications and business rules with customer SME and solve any issues * Facilitate an up to Two (2) hour work session with customer SME to design up to Five (5) notifications and business rules for support requests and record gaps in SMAX gap template * Content Factory: configure notifications and business rules for support requests as requested   **Support Request Plan:**   * Facilitate an up to Four (4) hour work session with customer SME to understand the re-usable task plans processes for up to Ten (10) support requests and record gaps in SMAX gap template * Configure up to Ten (10) support request models with as designed * Verify the support request models with two test users and resolve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure Task plans and models as requested   **Live Support:**   * Facilitate an up to Four (4) hour work session with customer SME to help understand the use of live support features in SMAX and record in ART |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured business rules and notifications for support requests * Configured support request rules and notifications * Configured support request models Fulfillment plans * ART content |
| ***Assumptions*** | * No automation to be configured in this phase * Support request models configured * Configured support request Fulfillment plans |
| ***Customer’s Responsibilities*** | * Make sure the right customer SME attends the session and provides two test user accounts * Provide the notifications and process rules for service requests and make sure the right customer SME attends the session * Provide possible re-usable procedures and make sure the right customer SME attends the session |
| ***Out of Scope*** | * Support requests that are planned for automation |

|  |  |
| --- | --- |
| ***IMPL-11*** | ***Subscription Management*** |
| ***Activities*** | **Subscription on CIs:**   * Facilitate an up to Two (2) hour work session with customer SME to help the customer to understand the concept of service offerings with subscription and subscribing to an asset and record gaps in SMAX gap template * Configure up to Two (2) service offerings with subscriptions as designed * Verify the service offerings with subscriptions and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more service offerings with subscriptions as requested   **Subscription on Services:**   * Facilitate an up to Two (2) hour work session with customer SME to help the customer to understand the concept of service offerings with subscription and subscribing to a service and record gaps in SMAX gap template * Configure up to Two (2) service offerings with subscriptions to services as designed * Verify the service offerings with subscriptions to services and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more service offerings with subscriptions to service as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured service offerings with subscriptions to assets * Configured service offerings with subscriptions to services |

|  |  |
| --- | --- |
| ***IMPL-12*** | ***External Knowledge Management*** |
| ***Activities*** | **External Knowledge:**   * Facilitate an up to Two (2) hour work session with customer SME to prepare the load of existing articles * Configure up to Twenty (20) knowledge articles as designed * Verify the up to Twenty (20) knowledge articles with the customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure and publish more knowledge articles as requested   **Review Process:**   * Facilitate an up to Two (2) hour work session with customer SME to verify the review process for external knowledge articles and fine tune the approvals and record the gaps in SMAX gap template * Configure the settings needed to establish the designed review process * Verify the knowledge articles review process with two test users and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure the external knowledge process as requested   **News Articles:**   * Facilitate an up to Two (2) hour work session with customer SME to configure up to fife (5) news articles * Configure up to Five (5) news articles as designed * Verify the up to Five (5) news articles with the customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure and publish more news articles as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured and published knowledge articles * Configured review process * Configured and published news articles |
| ***Assumptions*** | * Configured review process |
| ***Customer’s Responsibilities*** | * Provide updates article review process and make sure the right customer SME attends the session |

|  |  |
| --- | --- |
| ***IMPL-13*** | ***Request Fulfillment*** |
| ***Activities*** | **Request Automation:**   * Facilitate an up to Four (4) hour work session with customer SME to configure up to Two (2) different fulfilment plans for requests and record gaps in SMAX gap template * Configure service and support requests with fulfillment plans as designed * Verify the one service and one support request with fulfillment plan with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more service or support requests with fulfillment plans |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured fulfillment plans |

|  |  |
| --- | --- |
| ***IMPL-14*** | ***Incident Runbook*** |
| ***Activities*** | **Incident Automation:**   * Facilitate an up to Four (4) hour work session with customer SME to configure up to Two (2) different automated task plans for incidents and record gaps in SMAX gap template * Configure incidents and automated task plans as designed * Verify the incidents with automated task plan with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session |
| ***Outcomes*** | * SMAX gap template |

|  |  |
| --- | --- |
| ***IMPL-15*** | ***Change Management*** |
| ***Activities*** | **Normal/Emergency Change:**   * Facilitate an up to Six (6) hour work session with customer SME to design the normal and emergency change process necessary notifications and business rules and record gaps in SMAX gap template * Configure the normal and emergency change process, notifications and process rules as designed * Verify with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure additional change processes and rules as requested   **Standard Change:**   * Facilitate an up to Three (3) hour work session with customer SME to design the change process, notifications and business rules for standard requests and record the gaps in SMAX gap template * Configure the process, notifications and process rules as designed for standard change requests * Verify with customer SME and two sample end users the process of requesting a standard change and solve any issues * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Content Factory: configure Standard Change process as requested   **Change Models:**   * Facilitate an up to Four (4) hour work session with customer SME to configure up to Four (4) different change models that can be applied to change requests and record gaps in SMAX gap template * Configure change models as designed * Verify the up to Four (4) change models in action with customer SME and solve any issues * Content Factory: configure more change models as requested   **Advanced Calendar (Periods):**   * Facilitate an up to Two (2) hour work session with customer SME to help him to understand the capabilities of the change management calendar and record in ART.   **Change Templates:**   * Facilitate an up to Two (2) hour work session with customer SME to configure up to Four (4) different change templates that can be applied to change requests and record gaps in SMAX gap template * Configure change templates as designed * Verify the up to Four (4) change templates in action with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more change models as requested   **Change Approval:**   * Facilitate an up to Four (4) hour work session with customer SME to configure up to Two (2) change approval plans to change models and record gaps in SMAX gap template * Configure the change approval plans to change models as designed * Verify the change approval plans and change models and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more change approval plans as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured normal and emergency change requests and notifications * Configured standard change requests * Configured change models * ART content |
| ***Assumptions*** | * No automation to be configured in this phase * Configured standard change requests |
| ***Customer’s Responsibilities*** | * Provide the normal change process, notifications and process rules and make sure the right customer SME attends the session * Provide the roles matrix for change process * Provide the standard change process, notifications and process rules and make sure the right customer SME attends the session |

|  |  |
| --- | --- |
| ***IMPL-16*** | ***Release Management*** |
| ***Activities*** | **Simple Release Management:**   * Facilitate an up to Two (2) hour work session with customer SME to design the release process, notifications and business rules for releases and record gaps in SMAX gap template * Configure the release process, notifications and business rules as designed * Verify the release process, notifications and business rules with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure the incident process, notifications and business rules as requested   **Release Models:**   * Facilitate an up to Six (6) hour work session with customer SME to configure up to Two (2) release models with task-plan record gaps in SMAX gap template * Configure the release models with task-plan as designed * Verify the release plan with task-plan with the customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure additional release models with task-plan as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured release models with task-plan |

|  |  |
| --- | --- |
| ***IMPL-17*** | ***Configuration Management*** |
| ***Activities*** | **Manual CMS (UCMDB):**   * Facilitate an up to Six (6) hour work session with customer SME to design One (1) configuration model (including relationships) in UCMDB and record gaps in SMAX gap template * Configure the configuration items and relationships in UCMDB as designed * Verify with customer SME the configuration model and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: add more configuration items and relationships as requested   **Actual Services:**   * Facilitate an up to Six (6) hour work session with customer SME to design up to Twenty (20) actual services and record gaps in SMAX gap template * Configure up to Twenty (20) actual services into the SMAX system as defined in SMAX template * Verify the actual services with customer SME and solve any issues. * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more actual services as requested   **Service Components:**   * Facilitate an up to Six (6) hour work session with customer SME to design up to Ten (10) service components and relate them to actual services and record gaps in SMAX gap template * Configure the service components as designed * Verify the up to Ten (10) service components in relationship to actual services with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more service components as requested   **Infrastructure & Peripherals:**   * Facilitate an up to Four (4) hour work session with customer SME to design Ten (10) infrastructure and peripherals and record gaps in SMAX gaps template * Configure the infrastructure and peripherals as designed * Verify with customer SME the infrastructure and peripherals and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: add more infrastructure and peripherals as requested   **Configuration Items:**   * Facilitate an up to Six (6) hour work session with customer SME to design Ten (10) devices and peripherals and record gaps in SMAX gaps template * Configure the devices and peripherals as designed * Verify with customer SME the devices and peripherals and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: add more devices and peripherals as requested   **CMS Service Modelling:**   * Facilitate an up to Six (6) hour work session with customer SME to verify the UCMDB business service model * Configure the UCMDB business service model as designed * Verify the UCMDB business service model works as designed and resolve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure the UCMDB business service model as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured configuration items * Configured actual services * Configured service component and related to actual services * Configured devices and peripherals * Adapted UCMDB business service model |
| ***Assumptions*** | * SMAX service template |
| ***Customer’s Responsibilities*** | * Provide any existing data model and make sure the right customer SME attends the session * Provide the enhanced service model and make sure the right customer SME attends the session * Provide any existing data model and make sure the right customer SME attends the session |

|  |  |
| --- | --- |
| ***IMPL-18*** | ***Incident Management*** |
| ***Activities*** | **Simple Incident:**   * Facilitate an up to Four (4) hour work session with customer SME to design the incident process, notifications and business rules for incident and record gaps in SMAX gap template * Configure the process, notifications and business rules as designed * Verify the process, notifications and business rules with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure the incident process, notifications and business rules as requested   **Incident Template:**   * Facilitate an up to Four (4) hour work session with customer SME to design up to Five (5) incident templates and record gaps in SMAX gap template * Configure up to Five (5) incident templates as designed * Verify the incident templates with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more incident templates as requested   **Major Incident:**   * Facilitate an up to Two (2) hour work session with customer SME to design the major incident process, up to Two (2) notifications and record gaps in SMAX gap template * Facilitate an up to Two (2) hour work session with customer SME to design the major incident process, up to Two (2) business rules and record gaps in SMAX gap template * Configure the incident process, up to Two (2) notifications as designed * Configure the incident process, up to Two (2) business rules for major incident as designed * Verify the process, notifications and business rules with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Content Factory: configure the major incident process, notifications and business rules as requested   **Incident Task Plan:**   * Facilitate an up to One (1) hour work session with customer SME to design up to One (1) incident models with task-plan and record gaps in SMAX gap template * Configure up to Two (2) incident task plans as designed * Verify the incident task-plans with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to One (1) hour work session * Content Factory: configure more incident task plans as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured incident process * Configured templates * Configured major incident process * Configured task plans * Configured service model |
| ***Assumptions*** | * No automation to be configured in this phase * Provide the standard incident process, notifications and process rules and  make sure the right customer SME attends the session |
| ***Customer’s Responsibilities*** | * Provide the notifications and process rules for incident requests and make sure the right customer SME attends the session * Provide the standard incident process, notifications and process rules and make sure the right customer SME attends the session |

|  |  |
| --- | --- |
| ***IMPL-19*** | ***Problem Management*** |
| ***Activities*** | **Simple Problem:**   * Facilitate an up to Two (2) hour work session with customer SME to design the problem process, up to Two (2) notifications for problem and record gaps in SMAX gap template * Facilitate an up to Two (2) hour work session with customer SME to design the problem process, up to Two (2) business rules for problem and record gaps in SMAX gap template * Configure the problem process, notifications and business rules as designed * Verify the problem process, notifications and business rules with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure the problem process, notifications and business rules as requested   **Problem Task Plan:**   * Facilitate an up to Four (4) hour work session with customer SME to design up to Two (2) problem models with task-plan and record gaps in SMAX gap template * Configure problem models with task-plan as designed * Verify problem task-plan with models and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session   **Hot Topics:**   * Facilitate an up to Two (2) hour work session with customer SME to help him to understand the capabilities of the Hot Topics Analytics capabilities and how to use them and record in ART.   **Problem Template:**   * Facilitate an up to Two (2) hour work session with customer SME to configure up to One (1) different change template that can be applied to problem requests and record gaps in SMAX gap template * Configure problem templates as designed * Verify the up to Four (4) problem templates in action with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more problem templates as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured problem management process * Configured problem models with task-plan * Configured problem templates * ART content |

|  |  |
| --- | --- |
| ***IMPL-20*** | ***Internal Knowledge Management*** |
| ***Activities*** | **Knowledge Articles:**   * Facilitate an up to Four (4) hour work session with customer SME to help to understand what the internal knowledge article process is and how to effectively create internal articles and record in ART   **Internal Review Process:**   * Facilitate an up to Four (4) hour work session to describe the review process for internal knowledge management and records gaps in SMAX Gap template   **Knowledge from Problem:**   * Facilitate an up to Two (2) hour work session with customer SME to help them to understand how to analyze incidents with Hot Topic and help creating problem records and record in ART * Facilitate an up to Four (4) hour work session to describe the process how to analyze problems and create internal knowledge articles and records in ART |
| ***Configuration*** | * ART content |
| ***Customer’s Responsibilities*** | * Provide the roles matrix for knowledge management |

|  |  |
| --- | --- |
| ***IMPL-21*** | ***SLM*** |
| ***Activities*** | **SLM for Requests:**   * Facilitate an up to Four (4) hour work session with customer SME to create up to Two (2) service level (one SLA and one OLA) and record gaps in SMAX gap template * Configure up to Two (2) service level agreements as designed * Verify the service level with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure additional service levels as requested   **SLM for Incident:**   * Facilitate an up to Four (4) hour work session with customer SME to create up to Two (2) service level (one SLA and one OLA) for incidents and record gaps in SMAX gap template * Configure up to Two (2) service level agreements for incidents as designed * Verify the service level with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure additional incident service levels as requested   **SLM refined per Service:**   * Facilitate an up to Four (4) hour work session with customer SME to create up to Two (2) service level (one SLS and one OLA) and record gaps in SMAX gap template * Configure up to Eight (8) service level agreements as designed |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured one SLA and one OLA for requests * Configured service level for incidents * Configured service level for specific services |
| ***Pre-Requisites*** | * Service Modelling exists for the selected services |

|  |  |
| --- | --- |
| ***IMPL-22*** | ***Cross Functional*** |
| ***Activities*** | **Portal Configuration:**   * Facilitate an up to Four (4) hour work session with customer SME to define the elements for branding and look and feel and record gaps in SMAX gap template * Configure the branding elements as designed * Verify with customer SME that the branding of the end user portal reflects the design and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session   **Inbound Email:**   * Facilitate an up to Four (4) hour work session with customer SME to prepare and configure the activation of inbound email and record gaps in SMAX gap template * Configure the inbound email integration as designed * Verify the inbound email integration with customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session   **Time periods:**   * Facilitate an up to Two (2) hour work session with customer SME to help him to understand the capabilities of time periods and record in ART.   **Virtual Email:**   * Configure the modified Support Offerings as design * Facilitate an up to Four (4) hour work session with customer SME to help the customer to understand the virtual email capability. Prepare up to Two (2) Support Offerings and record gaps in SMAX gap template * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure more support offerings to respond to inbound email   **Assignment Routing Rules:**   * Facilitate an up to Six (6) hour work session with customer SME to configure up to Four (4) routing definitions and record them in SMAX gap template * Configure the routing definitions as designed * Verify the routing definitions with the customer SME and solve any issues * Create a knowledge article that describes the implementation in an up to Two (2) hour work session * Content Factory: configure additional routing definitions as requested |
| ***Outcomes*** | * SMAX gap template |
| ***Configuration*** | * Configured branding * Configured inbound email capability * Configured support offerings * Configured routing definitions * ART content |
| ***Customer’s Responsibilities*** | * Provide the branding items for end user portal and make sure the right customer SME attends the session * Provide access to a SMTP gateway * Provide access to the operating system console of installed OPB (on premise) * Provide the certificates for the SMTP gateway * Provide and configure and email address for incoming emails and provide that credentials |

|  |  |
| --- | --- |
| ***IMPL-23*** | ***Reporting and Dashboard*** |
| ***Activities*** | **Simple Reports:**   * Facilitate an up to Four (4) hour work session with customer SME to help understand the out of the box reporting capabilities and record in ART   **Complex Reports:**   * Facilitate an up to Four (4) hour work session to describe the SMAX data model to the customer and help to understand how to create new complex dashboard reports with durations, calculated fields or analytics. * Configure up to Two (2) complex dashboard reports inside SMAX   **BI Views:**   * Content Factory: configure BI Views as requested   **Reporting on Subscriptions:**   * Configure up to Two (2) reports on Subscriptions |
| ***Configuration*** | * ART content * Configured complex Reports * Configured Reports on Subscriptions |
| ***Assumptions*** | * No new calculated or automated fields need to be added to the SMAX tables to provide the logic of the reports |
| ***Customer’s Responsibilities*** | * Provide complex reporting requirements in priority * Provide complex dashboard requirements in priority * Provide reporting requirements for Subscription in priority * Provide dashboard requirements for Subscription in priority |
| ***Out of Scope*** | * Formatting in any external BI Tool |

|  |  |
| --- | --- |
| ***IMPL-24*** | ***Survey Management*** |
| ***Activities*** | **Request Surveys:**   * Facilitate up to Four (4) hour work session with customer SME to help understand the out of the box survey capabilities and record in ART * Content Factory: configure additional Request Surveys as requested   **Incident Surveys:**   * Facilitate up to Four (4) hour work session with customer SME to help them to understand how to prepare a new incident survey and assign it to the process and record in ART * Content Factory: configure additional Incident Surveys as requested |
| ***Configuration*** | * ART content |

|  |  |
| --- | --- |
| ***IMPL-25*** | ***Smart Analytics*** |
| ***Activities*** | **Virtual Agent:**   * Facilitate up to Two (2) hour work session with customer SME to help them to understand the virtual agent capability and support the customer in activating and announce the usage to end users and record in ART * Configure up to Fifty (50) training sentences for the Virtual Agent   **Smart Analytics Tuning:**   * Facilitate up to Two (2) hour work session with customer SME to help him to understand the possibilities of tuning the Smart Analytics Capability and record in ART * Analysis and improvement of the Smart Analytics configuration though stop-words, memory settings and data quality |
| ***Configuration*** | * ART content |

|  |  |
| --- | --- |
| ***SDX-01*** | ***OPTIONAL – SMART DX*** |
| ***Activities*** | * Kickoff: Run 2x workshops with the appointed portfolio and (enterprise) architecture stakeholders to establish a shared understanding of the end-to-end service lifecycle and associated key design- and decision criteria * Enhance Portfolio Management: Provide hands-on guidance for evaluating current service performance, identifying and prioritizing service improvement opportunities * Co-create Architecture Principles: Establish/enrich an (essential) set of design principles related to integrated service life cycle workflow, service topology, service offer and task plans * Enrich Impact analysis: Provide hands-on guidance during for deep-dive impact assessment related to automated end-to-end service life-cycle management to define additional features and user-stories for the program backlog * Enhance Program Management: Provide hands-on guidance for prioritizing the program- and team backlogs during the program increment planning. * Govern Service Onboarding: Provide supplemental hands-on guidance to ‘content factory’ teams, to validate if service onboarding is aligned with the agreed architecture principles. |
| ***Assumptions*** | * The baseline program activities defined to address scope defined in the RFP * This add-on work package is aligned with phase 1 and 2 timelines. * It is extending & enriching the RFP mandatory portfolio, program management and design authority activities |
| ***Customer's Responsibilities*** | * Helseplattformen will retain accountability for service portfolio management and architecture governance. |
| ***Outcomes*** | * Kickoff workshop presentation materials * Co-created architecture design principles as related to designing SMAX workflows, service topologies, service offers and task plans. |
| ***Acceptance Criteria*** | * Agreed timesheets. |

|  |  |
| --- | --- |
| ***CS-01*** | ***OPTIONAL – Consultancy Services*** |
| ***Activities*** | A senior consultant will be available for the duration of the Support and Maintenance period to:   * Provide consultancy and guidance around the solution, processes and tools. * Act as a trusted advisor for platform evolution. * Support Helseplattformen in analyzing enhancement / improvement requests.   Joint agreement can be made to define three suggested levels of enhancements / improvements complexity / effort required:   * Basic   + Effort up to 2 people-days? * Medium   + Effort up to 5 people-days? * Complex   + Effort over 5 people / days, to be determined.   Weekly sync-point meetings could be set up, for proper alignment and control.   * Enhancement Waves could also be considered, as necessary, where several improvements could be included. |
| ***Assumptions*** | * Consultant will be available for an average of 5 hours per week. |
| ***Customer's Responsibilities*** | * Helseplattformen will plan and communicate sufficiently in advance (2 working days) the need to engage the consultant. |
| ***Out of Scope*** | * Actual implementation of enhancement / improvement requests is not part of this work package. * Suggestion is Enhancement Waves can be planned, as needed, where several improvements can be considered, estimated and costed using the Micro Focus consultants’ rate card, and once approved, implemented. |

### Work Packages Description – SUPPORT AND MAINTENANCE

|  |  |
| --- | --- |
| ***SUPP-MNT*** | **Support & Maintenance Services** |
| ***Short Description*** | Support and Maintenance Services, to ensure the solution is available, accessible, responsive and working as designed. |
| ***Activities*** | Manag-E Nordic AS, partnering with Micro Focus for this engagement, delivers SMAX as a SaaS service from a data center in Oslo, to customers and users all over the world. The delivery includes a number of elements or sub-services that together make up the complete SaaS service. The list below briefly describes this:   * The software is installed, upgraded, patched (maintained) as needed, and operated continuously (24x7). The software itself is developed and delivered to Manag-E by Micro Focus, and it is also Micro Focus that develops upgrades, patches, etc. There are currently hundreds of SMAX customers in the world, and large resources are used to further develop the software continuously, with four upgrades per. year. * The infrastructure is installed, upgraded as needed and operated continuously (24x7). * Central to the operation is continuous monitoring, both of infrastructure and software 24x7. * The platform on which SMAX runs has a core consisting of Docker for containers and Kubernetes as the central engine in operation. The platform is configured for high availability, with built-in failover. * Customers normally report the solution via a form in the Manag-E Nordic service portal which is read / answered by the Service Production Department. Errors that can be solved by Manag-E are handled there, otherwise the error message is conveyed to the subcontractor. * Errors that involve downtime for one or more customers will always be followed up via a Root Cause Analysis process, with a focus on how such errors can be avoided in the future. * Quarterly reviews are held with the individual customer, with a report on uptime etc. for the period that passed, as well as a focus on what will happen in the future. |

### Training Content

#### Introduction

The following section describes:

* The standardized “SMAX jobs” and related tasks to have a common understanding of the learning points covered
* The Education courses’ suggested planning
* The contents of the recommended courses
* Education courses’ scope: licenses and services budget.

For a fee, the customer may want to add extra instructor-led sessions or additional licenses in the future.

#### SMAX Jobs

The naming conventions, responsibilities and roles differ across organizations.

Micro Focus uses the concept of “SMAX-Jobs” to standardize definitions and clarify what to expect from the related courses.

Notice that the same person could have several “SMAX-Jobs” in your organization.

| SMAX-Jobs | Description |
| --- | --- |
| **Service Desk Agent** | Service Desk agents handle, fulfil, and resolve multiple requests from business users |
| **Support Engineers** (or those using SMAX to receive and update incidents or tasks) | A Support Engineer   * Process and resolve support and infrastructure issues * Categorize and track different types of service interruptions, such as service unavailability, performance issues, hardware or software failures, and ensure that incidents are resolved within agreed service level targets (Incident Management) * Identify the underlying reasons for one or more related incidents (Problem Management) * Control changes to baseline service assets and configuration items across the entire service life cycle (Change Management) * Manage, plan, schedule, and control the software changes through different stages and environments, including testing and deploying to the production environment (Release Management) |
| **Configuration and asset managers** | An Asset Manager will use the Service Management Automation X to obtain and maintain current information about business services and devices used to track defects, change requests, and problems. |
| **Service or Process Owners** | A Service or Process Owner will use the Service Management Automation X to sponsor, design, document, publicize and continuously improve different processes by ensuring compliance with enterprise policies |
| **Tenant Administrators** | A Tenant Administrator uses Service Management Automation X to perform various management tasks that range from data management, people management to how to design your applications and their workflows. |
| **Suite Administrator** | Perform administrative tasks in the Suite Administration application that range from managing license pools, suite administrative operations to configure suite level settings, including security, email, integration and configure access control. |

#### Education Courses’ suggested planning

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Conceptual Phases | | | |
| SMAX - Jobs | Design | Implementation | Release to production | Ongoing |
| SMAX - Jobs | So that your team could make informed decisions related to the implementation |  | So that your team were ready on day 1 | Support on the job. Knowledge refreshment. Role Changes |
| Service Desk Agents |  |  | ART E-Learning Module for Service Desk Agents | |
| Support Engineers (or those receiving and updating incidents or tasks) |  |  | ART E-Learning Module for Support Engineers | |
| Selected Configuration and Asset managers | Instructor-Led  SMAX220- Technical Configuration for Configuration and Asset Managers |  |  | ART E-Learning Module for Configuration and Asset Managers |
| Rest Configuration and Asset managers |  |  | ART E-Learning Module for Configuration and Asset Managers | |
| Service or Process Owners | Instructor-Led  SMAX300 - Technical Configuration for Service or Process Owners |  |  | ART E-Learning Module for Service or Process Owners |
| Rest of Service or Process Owners |  | Instructor-Led  ART Content Authoring[[1]](#footnote-2) | ART E-Learning Module for Service or Process Owners | |
| Tenant Administrators | Instructor-Led  SMAX310 - Administration for Tenant Administrators |  |  | ART E-Learning Module for Tenant Administrators |
| Suite Administrator | N/A | N/A | N/A | N/A |

If the customer wanted to edit the out of the box e-learning content provided or create additional learning materials (job aids, documentation, working instructions with simulations…)

#### Recommended courses’ content - Instructor-Led

| **SMAX220- SMAX Technical Configuration for Configuration and Asset Managers** |
| --- |
| This course covers how a configuration and asset manager uses the Service Management Automation X (SMAX) agent interface to obtain and maintain current information about business services and devices used in tracking defects, change requests, and problems. You are a service asset and configuration manager who wants to describe the services and all their components, collect current information about a new Online Book Store business service to close defects, fulfil change requests, solve problems, and manage contracts with the vendors. This course helps you create, handle, and track these individual assets supporting your business services.  **Learning Points** • Describe the basic architecture of SMAX • Explain the SACM model hierarchy and relationship • Create a service definition • Create an actual service • Create a service component • Create a device (asset) record • Create a system element • View impact • Manage Stockroom and reserve an asset • Create an asset model and receive an asset • Manage software asset license • Create a subscription for an asset manually • Manage an existing vendor and add a brand • Add a maintenance contract • Create a report and manage the dashboard. |

| **SMAX300 - SMAX Technical Configuration for Service or Process Owners** | |
| --- | --- |
| This course covers how a Service or Process Owner will use the Service Management Automation X (SMAX) agent interface to sponsor, design, document, publicize, and continuously improve different processes by ensuring compliance with enterprise policies. You are a service or process owner who wants to design catalogue offerings for an online bookstore with defined targets, create knowledge materials for easy usage of this offering, handle any issue, provide ideas, and derive proposals for a project, program, and application portfolio implementation. You will follow through creating, categorizing, prioritizing, managing, and collecting, through to tracking these comprehensive helpdesk solution processes that manage support and service requests, incidents, change requests, and problems. | |
| **Learning Points**  • Describe the basic architecture of SMAX • Explore Service Catalog Management module • Explain service catalogue relationship with SACM model • Create a service catalogue category • Create a service definition • Create a service offering • Create a support offering • Create a human resource offering • Create a bundle offering • Add a fulfilment plan • Create a holiday and work schedule • Create a service level target set and update target definitions • Create a support agreement • Create a service agreement • Create an Operational Level agreement • Perform a global search for knowledge • Create an article model • Create a knowledge article • Review, modify and preview a knowledge article • Publish a knowledge article • Archive a knowledge article • Publish an IT News Article • Moderate questions and answers  • Analyze self-service portal knowledge searches | • Create a support offering from a hot topic user question • Create a knowledge article from a hot topic support request • Create a New Survey • Prepare a survey for execution • Test the new survey manually and analyze survey data • Set up on-call schedule management • Set up an assignment strategy and manage notifications • Create a new idea • Create a new business objective and resource type • Create a new proposal • Use proposal analytics to analyze proposal data • Navigate the executive summary dashboard • Create a project • Plan a project • Execute a project • Create and edit a program • Create and edit a project portfolio • Create and edit an application record • Create and edit a portfolio record • Create an optimization record • Review optimization record details • Create a proposal from an optimization record |

| **SMAX310 - SMAX administration for Tenant Administrators** | |
| --- | --- |
| This course covers how a tenant administrator will use Service Management Automation X (SMAX) to perform various management tasks that range from data management, people management to designing the applications and their workflows. You are a tenant administrator who wants to perform all administrative tasks in service management to set up a new process-based book order application, from creating custom record types with forms, fields, business rules, processes, notifications, and workflows defining custom actions and predefined lists. You also want to design and administer the look and feel of the service portal and are interested in customizing the default application settings, settings for a smart ticket, and search with an automatic routing solution. You also want to manage access to different parts of the application, locations and provide different groupings of a record for classification. You want to manage configuration data across tenants and view sample data. From creating, importing, managing, designing, administering, customizing, and analyzing these administrative operations, you will learn how SMAX helps in this and future situations. You have not used SMAX before. | |
| **Learning Points** • Describe studio features • Create a custom field and add it to the record type • Add a Calculated field • Custom field onto required forms • Create a phase and transition rules • Create Business rules • Create Notifications and brand it • Build an Approval Definition • Import and Export Data • Import translations • Configure Custom Action and manage Service Level Targets • Create a custom Application and Record Type • Create a List | • Create a Custom Theme and describe Basic Settings • Design Category Tiles • Configure additional display settings • Manage Portal Feature settings • Customize Application settings • Create a Smart Ticket task • Customize Smart Search Settings  • Create a Routing Definition • Edit a User record • Create a contact record • Create a New User Group • Create a Role and update Permissions • Manage Locations • Create a Category and Sub-Category |

#### Recommended courses’ content - Self-Paced (eLearning like)

| Module | Overview |
| --- | --- |
| SMAX for Service Desk Agents | * Request Management to Fulfill/Resolve End User Requests   You will learn how to create a request, process a resolution request, approve a request, complete a fulfilment task to resolve a request, and use the different user interface capabilities like filters, views, discussion, and chat.   * Utilize and Contribute Knowledge for Request Fulfillment:   You will learn about knowledge, how to use an available knowledge base to resolve a request, and how to contribute gained knowledge to your SMAX knowledge database.   * Create Reports and Manage Dashboard:   You will learn how to create a report and manage your dashboard. |
| SMAX for Support Engineers | * Incident Management   You will learn key concepts of SMAX, incident templates and model, incident resolution, and service level management for incidents.   * Problem Management   You will learn the problem management approach, problem-related records, duplicate problem, problem templates, and guided problem analysis.   * Change Management   You will learn the change types, standard and normal change workflow, change templates and models, change task plan, change management procedures, log and evaluate a change, plan the change, and approve the change plan.   * Change Calendar and Change Analytics   You will learn to change the calendar user interface, periods, impact, visualization, change analytics – performance improvement, SACM references, and change analytics.   * Release management   You will learn the release model, task plans, release management procedures, log and evaluate a release, plan the release, build and test the release, approve release deployment, and release and change the calendar.   * Reports and dashboards   You will learn about report types, report user interface, report centre pane, report properties, and dashboard. |
| SMAX for Configure and Asset Managers | * Organizing and tracking individual assets in the SACM model hierarchy   Learning SACM activities when introducing and building out a new Business Service: Accessing the SACM interface, Build a new service definition and view Impact analysis.   * Organizing and Managing the available devices   Manage the Stockroom, reserve a Device and License from the Stockroom, Create and Manage asset models, Receive the new assets and create a Subscription manually.   * Managing service vendor relationships and contracts through their lifecycle   Accessing the vendor and contract management interface, add a Vendor, view contract information for an asset related to a ticket, add a maintenance contract, add a new device to a maintenance contract, create a license and license model.   * Publishing reports   Creating reports and customizing your dashboard. |
| SMAX for Service or Process Owners | * Categorizing and managing services and offerings   Learning service catalogue management activities when introducing and building out new offerings: Access the service catalogue interface, validate the category and service definition information and build a new service and support offering along with the required rules and task plans.   * Defining and tracking review and resolution metrics   Learning service catalogue management activities when introducing and building out new offerings: Access the service catalogue interface, validate the category and service definition information and build a new service and support offering along with the required rules and task plans.   * Organizing and handling knowledge articles   Access knowledge management, search for knowledge, create an article model, create, review, modify, preview, publish and archive knowledge articles.   * Organizing and handling other knowledge resources   Publish news, moderate questions and answers, analyze hot topic trends and create offerings/articles.   * Collecting user feedback and managing agent availability   Create a survey, export survey responses, analyze the answers to text questions in surveys via hot topic analytics, access on-call schedule management, View the agent schedule, configure and update the on-call schedule and on-call rotation and manage on-call assignment strategies and notifications.   * Driving innovation with social collaboration for continuous improvement of IT services   Access the idea and proposal management module, create a new idea, create a change or proposal from an idea, create a new proposal, create a new resource type, create a new business objective and use proposal analytics to analyze proposal data.   * Tracking and managing IT projects, programs, and portfolios   Access the project and program management module, navigate the executive summary dashboard, create and edit projects, programs and project portfolios.   * Assessing and prioritizing applications to be modernized   Access application portfolio management, create and edit portfolio records, create and edit an application record, add a roadmap record, create and edit an optimization record, define an optimization type, send a survey and create a proposal from an optimization record. |
| SMAX for Tenant Administrators | * Managing a record type’s workflow   Learn about studio capabilities in managing workflows for record types: field, forms, business rules, processes, notifications and custom record types.   * Customizing record type workflows and lists   Import data, export data, import translations, Custom Action, add new user-defined tables that contain records that can be linked in relationships with existing application tables, add approvals, define service level targets for the application and customize drop-down field values with predefined/customized list values.   * Administering the Service Portal   Access service portal settings, configure display theme settings and feature settings, authorize knowledge handling and user selections, and enable users to edit.   * Customizing settings and routing records to correct groups   Access application settings, customize/view the default settings, customize smart ticket and search settings (smart analytics), and create and edit a visual routing definition that is easy to read and maintain.   * Administering people, locations and categories in the organization   People records-user and contacts, assign roles, manage groups with users of common interests or assignments and administer locations and categories.   * Securing record types and data   Manage entitlement rules, encryption domain for specific fields and use strong identity validation, and enable data domain segmentation   * Synchronizing, analyzing and debugging data   Access the Package manager, export configuration data from the tenant, view and analyze imported sample data, debug issues. |

#### Education Courses’ Scope

|  |  |  |
| --- | --- | --- |
| Licensed Self-Paced Training | | |
| Licenses | Note | |
| 3-year Time-limited Subscription, effective upon delivery, to:   * Out of the Box ART eLearning Content Pack for SMAX (1xSWAA295P9) * Up to 600 students/users (12xA8B42AAE) | This proposal does not include the hosting service for the eLearning Content Pack.  The ART Content Pack must be deployed to a customer web server or a customer SCORM-compliant LMS for its consumption.  Upon expiration of the Term, the Purchaser must uninstall and delete such software products (including any update provided during the provision of support services) and cease all use of the license keys for the Subscription Licenses. | |
| Instructor-Led Training and other services | | |
| Service | Type | Qty |
| ART Authoring Workshop + Assistance to deploy the content to a customer web server or LMS | Workshop (up to 6 people)  + Assistance days | 4 days |
| SMAX220- Technical Configuration for Configuration and Asset Managers | Instructor-Led – Remote  Private Session Large Group (up to 12 students) | 1 Session (2 days) |
| SMAX300 - Technical Configuration for Service or Process Owners | Instructor-Led – Remote  Private Session Large Group (up to 12 students) | 1 Session (4 days) |
| SMAX310 - administration for Tenant Administrators | Instructor-Led – Remote  Private Session Small Group (up to 6 students) | 1 Session (5 days) |

## APPENDIX B – ENGAGEMENT GOVERNANCE

|  |
| --- |
| **ENGAGEMENT GOVERNANCE** |

### Assumptions

1. Services described in this SOW will be performed either at Customer’s facilities and/or remotely at Micro Focus consultant local office locations as specified in the “Delivery Location(s)” section on the first page of this SOW.
2. Micro Focus uses a forty (40) hour work week as its standard. Micro Focus resources working on-site use a standard schedule of four (4), ten (10) hour days, Monday through Thursday; and working offsite or offshore use a standard schedule of five (5), eight (8) hour days, Monday through Friday. Work hours are between 8am and 6pm local time excluding Micro Focus’ holidays, or other standard local business hours as mutually agreed (“**working days**”).
3. The on-site/off-site schedule of the Micro Focus team will be mutually agreed prior to the commencement of the Services. Micro Focus and Customer agree to plan an on-site/off-site schedule that leverages off-site work as much as possible.
4. Any Services, Deliverables and/or Configurations not documented in Appendix A are considered outside the scope of this SOW.
5. Micro Focus may choose to utilize qualified subcontractors.
6. This SOW does not contemplate the sale of products or support services, which shall require the necessary terms and conditions for such purchase pursuant to separate agreement between the parties.
7. All documentation created for this project will be available in electronic format using Microsoft Office applications. If applicable, the project planning software used for this project will be Microsoft Project.
8. The Services described in this SOW do not include delivery of Services provided by Micro Focus Software Support, including the fixing of software bugs, and the tracking of potential product issues in one of the out of the box functions. This work is understood to be performed between Customer and Micro Focus Software Support as part of the product licenses.
9. Customer is solely responsible for assessing the product or service for compliance with any legal or industry requirements applicable to Customer, including but not limited to those required by HIPAA, the Gramm-Leach-Bliley Act ("GLBA"), the Fair and Accurate Credit Transactions Act ("FACTA"), and the Payment Card Industry Data Security Standard (PCI-DSS). Micro Focus neither represents nor warrants that its products or services comply with any specific laws, regulations, or standards, unless otherwise specifically stated in this SOW.
10. The parties acknowledge that successful completion of the Services will require their full and mutual good faith cooperation. Where agreement, approval, acceptance, consent or similar action by either party is required by any provision of this SOW, such action will not be unreasonably delayed or withheld. Customer agrees that to the extent its failure to meet its responsibilities results in a failure or delay by Micro Focus in performing its obligations under the Agreement, Micro Focus will not be liable for such failure or delay.
11. If an engagement end date is not stated in this Agreement, the terms and conditions of this SOW expires <<X months>> from the Effective Date. If either party wishes to extend it, both parties can mutually agree to extend before the expiration date. If date of expiration has been exceeded, a new and independent contractual agreement will need to be drawn up and agreed by both parties.
12. Micro Focus may utilize Micro Focus employees under this SOW for the sole purpose of training such employees (“Training Resources”). The Training Resources will not be directly responsible for any obligations associated with this SOW and Customer will not be charged for training time incurred by the Training Resources. Customer acknowledges that Training Resources may accompany Micro Focus personnel to Customer’s site, if applicable, and Micro Focus will ensure that all Training Resources adhere to the terms and conditions of this SOW and the Agreement, as applicable.
13. The Customer will notify Micro Focus in case Micro Focus would be required to process Personal Identifiable Information (“PII”), Personal Health Information (“PHI”) or Payment Card Industry (“PCI”) information when providing Services under this SOW and agree with Micro Focus on required data processing terms.
14. A joint steering committee consisting of Customer and Micro Focus management staff, as described in Appendix B, will be established for the purpose of this project within the first ten (10) business days following the official start date of this project (“**Project Steering Committee**”).
15. Services identified in this SOW which include configured, installed, upgraded or implemented software are not subject to Customer acceptance.
16. Even if Deliverables and/or Configurations include modifications for hardware or software products, such products or related maintenance are not offered under this SOW or the underlying Agreement, but are subject to a separate product (hardware or software license) agreement between the parties.
17. Customer agrees not to solicit, or make offers of employment to, or enter into consultant relationships with, any Micro Focus employee involved, directly or indirectly, in the performance of Services hereunder for one (1) year after the date such employee ceases to perform Services under this SOW. Customer shall not be prevented from hiring any such employee who responds to a general hiring program conducted in the ordinary course of business and not specifically directed to such Micro Focus employees.
18. Customer may reschedule Services without charge if written notice of the rescheduling is received by Micro Focus at least ten (10) business days prior to such rescheduling taking effect; otherwise Customer shall pay Micro Focus an amount equal to forty (40) hours of the rescheduled Services rate for each scheduled Micro Focus resource. Customer shall promptly reimburse Micro Focus for all non-cancelable expenses, including any airfare.

### Roles and Responsibilities Matrix

The engagement team will consist of both Customer and Micro Focus key engagement personnel fulfilling the roles. Micro Focus shall manage the delivery of services in relation to each Work Package in accordance with the organizational structure set out in the table below.

Note: not all roles are equivalent to FTE’s.

| **Agile Level** | **Customer Roles** | **Micro Focus Delivery Roles** |
| --- | --- | --- |
| All | * Customer Programme Manager: Single point of contact for Micro Focus Programme Manager and Micro Focus Consultants through-out the Engagement for interfacing with the Customer organization. | * Programme Manager: For the duration of the engagement, Micro Focus will assign a Programme Manager to secure all management task and duties to secure that actions and activities described in this SOW are fulfilled with the right level of quality. |
| Portfolio | * Executive Sponsor: Person from Customer that has Executive level presence that can cut through red tape to make this engagement happen and ensure that there is buy-in from all levels. Typically, this is the chair of the Steering committee. * Enterprise Architect: The Enterprise Architect, depicted at the Portfolio Level, operates across Programs and has the responsibility to help assure that the IT/software development strategies and technologies are aligned with the evolving business needs of the enterprise | * Engagement Sponsor: The Micro Focus Engagement Sponsor will be member of the Steering Committee and will act as Micro Focus Sr. Management representative to make this Engagement a success and act as escalation point for any issues that may arise and required Sr. Management attention. * Enterprise Architect: Micro Focus Lead Solution Architect, depicted at the Portfolio Level, operates across Programs and has the responsibility to help assure that the IT/software development strategies and technologies are aligned with the evolving business needs of the enterprise. |
| Program | * Test Team: Helseplattformen AS Team of people responsible for testing the completed test cases and the retesting of any defects found. * Manager of Change: Creates and executes an action plan for the implementation of the new solution within the Customer organization. Document organizational alignment to all the process roles, as well as implications, obstacles, and gaps which need to be addressed in order to implement the roles | * Solution Architect: The Solution Architect has the responsibility for maintaining a high level understanding of the user’s vision for what the subject system needs to do, as well as maintaining and evolving an understanding of the implementation framework necessary to support current and upcoming user and business needs. |
| Agile Team | * Product Owner: The member of the team responsible for defining and prioritizing the Team Backlog so as to streamline the execution of program priorities, while maintaining conceptual and technical integrity of the Features or components the team is responsible for. * Scrum Master: The Scrum Master is a team member who has a primary responsibility to help the self-organizing, self-managing team achieve its goals. For the second Program Increment, the Customer will assign a Scrum Master to guide and support the Scrum Team in their activities and daily work. * Scrum Team Members: Customer team members that are assigned for the duration of the engagement or logical units that work closely together with the Micro Focus scrum team members realizing and testing the Features defined in the backlog. * Stakeholders: Customer stakeholders available for workshops, able to articulate constraints and implications for the engagement, available to input to test plans and user acceptance. * Customer Subject Matter Experts [SME’s]: Throughout the engagement various experts are required to build the new environment and the actions to prepare the final production systems. Typically these experts cover: * Networking, * Systems; * Databases; * Web-Tier.   These experts are also expected to contribute in the “Systems team” during the Implementation phase. | * Product Owner: During the first 6 Sprints, Micro Focus will assign a Product Owner to support the Customer Product Owner in its role providing experience and expertise in the Solution field. * Scrum Master: The Scrum Master is a team member who has a primary responsibility to help the self-organizing, self-managing team achieve its goals. For the initial Program Increment, Micro Focus will assign a Scrum Master to teach, guide and support the Scrum Team in their activities and daily work. * Scrum Team Members: Micro Focus Technical Consultants & Solution Architect who are working in close collaboration with Customer realizing the required Features as defined in the backlog. |

Figure 10 - Organizational Structure

Further detailed planning shall take place with Customer during the engagement Initiation Sprint and this could affect the organization structure and responsibilities after starting the engagement.

### Engagement Structure

The project team will consist of both Customer and Micro Focus key project personnel fulfilling the roles as described in the above Figure 10 - Organizational Structure.

### Monitor & Control

Under the Scaled Agile Framework traditional groups like “Steering Committee” and “Engagement Boards” are replaced by “Program Increments (PI) Planning Events” (at least every 10 weeks) and Sprint events (every 2 weeks).

The overriding assumption here is that the capacity proposed in section “1.5 Engagement” of this SOW is adequate for the desired Features listed in ‘Figure 9 - Features identified during the RFP (TBC in the Workshows)’ as they are currently understood within the specific Customer context – as stated earlier this will be reviewed and affirmed during the Initiation Sprint after starting the engagement.

If the resource estimates and workload do not ultimately match the capacity that is provided for by this SOW, then this will need to be discussed during Program Increment / Release planning during the Initiation Sprint (SP-3 – IP0), and resolved prior to commencing Program Increment 0. At the highest level, should this occur, the two primary options are:

1. Reduce the workload to match the capacity provided for by this SOW.
2. A CR is raised to increase the available capacity.

### Steering Committee

Apart for the standard Agile Governance, a joint Steering Committee for the Programme will be put in place, which will allow for any escalations to be resolved quickly by Helseplattformen AS and Micro Focus.

The Steering Committee will consist of **Error! Unknown document property name.** Programme Manager, Micro Focus Programme Manager and decision making managers and project sponsors from both Micro Focus and **Error! Unknown document property name.**.

### Communication Method & Meeting Cadence

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Topic** | **Method** | **Frequency** | **Goal** | **Owner** | **Audience** |
| Project status report | Email | Weekly | Review project status and discuss potential risks and known issues | Project Manager | Project team + project sponsor |
| Project review | Meeting | At milestones | Present project activities, gather feedback, and discuss next steps | Project Manager | Project team + project sponsor |
| Task progress updates & team standup | Meeting | Daily | Share daily progress made on project tasks; and discuss what each team member did yesterday, what they’ll do today, and any blockers | Project Manager | Project team |
| Post-mortem meeting | Meeting | At end of project | Assess what worked and what did not work and discuss actionable takeaways | Project Manager | Project team |

Engagement Status Reports will be prepared by Micro Focus for review and discussion at the Status Meetings. Status reports are deemed accepted upon delivery by Micro Focus to Customer.

### Issue Management and Escalation Process

Timely resolution of issues is critical to maintaining project control. The purpose of the escalation process is to help ensure that issues are identified and resolved quickly.

The escalation process provides a mechanism to alert Project Managers and other management personnel about issues not being resolved. Either Micro Focus or Customer may escalate a project issue as follows:

|  |  |  |
| --- | --- | --- |
|  | **Action** | **Escalation Contact** |
| **Level 1** | Raise the initial issue | Micro Focus and Customer Project Managers |
| **Level 2** | Generate an Issue Report | Project Sponsor |
| **Level 3** | If issue cannot be resolved within a predetermined period (2 weeks) or falls outside the authority of the Project Sponsor | Project Steering Committee or equivalent if there is no project steering committee |
| **Level 4** | Certain internal Micro Focus issues | Micro Focus Client Principal or Practice Principal |

### Quality Assurance and Risk Assessment

Micro Focus may periodically conduct a Quality and Risk Assessment review at Customer’s site(s) focusing on project management and/or technical architecture and execution. Additional review of project planning and controls may also be performed. To assist Micro Focus with providing an effective quality and risk review, Customer agrees to participate in interviews of the project sponsor and key Customer management staff, at least once during the execution of the activities described within this SOW.

## APPENDIX C – DEFINITIONS

|  |
| --- |
| **DEFINITIONS** |

### Definitions

Unless otherwise specified herein, words and expressions in this Statement of Work shall have the following meanings, as set out in Figure 11 - Definitions below.

| **Definition** | **Meaning** |
| --- | --- |
| **Agile** | Software development and delivery methodology, based upon the following principles:   * Our highest priority is to satisfy the customer through early and continuous delivery of valuable software. * Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage. * Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale. * Business people and developers must work together daily throughout the project. * Build projects around motivated individuals. * Give them the environment and support they need, and trust them to get the job done. * The most efficient and effective method of conveying information to and within a development team is face-to-face conversation. * Working software is the primary measure of progress. * Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely. * Continuous attention to technical excellence and good design enhances agility. * Simplicity--the art of maximizing the amount of work not done--is essential. * The best architectures, requirements, and designs emerge from self-organizing teams. * At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behaviour accordingly. |
| **Architecture Runway** | * The platforms and associated infrastructure that is necessary for execution of Sprints, delivery of ‘working software’, and for release into production (Development, Testing / Staging, Production etc.); this is typically expanded and scaled on a ‘*just in time*’ basis as Program Increments progress. |
| **Backlog** | * A backlog is a list of things to do. If a thing is in there, it might get done. If it isn’t there, there is no chance that it will be started. * It represents opportunities, not commitments. * Detail is defined just-in-time and progressively elaborated. * There are backlogs at each level in the SAFe® Framework. |
| **Customer Programme Manager** | The representative of the Customer who is directly responsible for liaison with Micro Focus and the delivery by the Customer of the Customer Responsibilities. |
| **Definition of Done (DoD)** | A checklist of criteria that must be met in order to confirm that an item in a backlog is finished. For details please be referred to Appendix C – Definitions of Done (DoD). |
| **Enabler** | Epics can appear at the level of Epics, Capabilities and Features, but do not deliver value directly in their own right. The value of enablers is typically realized through the use of Capabilities and Features. |
| **Epic** | Epics are big, bold, audacious, impactful, game changing, initiatives. Differentiating & providing competitive advantage. They include embryonic justification, and value statements may be derived from other (non-agile) disciplines within the enterprise. |
| **Feature** | Features are short, descriptive, value delivery & benefit-oriented statements. Customer and marketing understandable. Features state cost and value, with sufficient granularity to support prioritization in Program Increment / Release planning and clear PI objectives. |
| **PI** | Program Increment |
| **Portfolio backlog** | The Portfolio backlogs are the ultimate ‘statement of intent’ containing Epics and Capabilities respectively. |
| **Product Manager** | * Owns Program Backlog * Defines Features, PIs, and releases; Collaborates on architectural Features. * Owns pricing, licensing, and ROI |
| **Product Owner** | Primarily responsible for defining and prioritizing requirements.   * Working with product managers, business analysts, customers and other stakeholders to determine requirements. * Maintaining the team backlog and setting priorities based on relative user value. * Setting objectives for the iteration. * Elaborating stories, participating in progress reviews, and accepting new stories. |
| **Program Backlog** | The Program backlog breaks Epics and Capabilities down into Features, and for the next Program Increment will map these Features to initial Stories. |
| **Program Increment (PI)** | * Provides a strategic quantum of time-box and value to the enterprise – comprises multiple Sprints. |
| **Programme Manager** | Means the individual responsible for the delivery of the engagement and its constituent Work Packages, Services, Deliverables and Responsibilities from a Micro Focus perspective, as set out in this Statement of Work; |
| **Scrum Master** | * Facilitating the team’s progress toward the goals of the iteration. * Leading the team’s effort in continuous improvement. * Enforcing the rules of the agile process. * Eliminating impediments. |
| **Solution Demo** | Demonstration by all Agile Release Trains, of all working software that has been delivered for a solution, either by the end of a Program Increment or prior to a release. |
| **Solution Intent** | Solution Intent defines the Solution which is uniquely associated with one Value Stream. The Solution Intent is the single source of truth with respect to intended AND actual Solution behaviour. The Solution Intent contains specifications, designs and tests; providing traceability from current to future Solutions  The Solution Intent evolves from a fixed to variable state:   * Fix only minimum requirements and designs at the outset * The remainder is validated continuously throughout iterative cycles * Preserve flexibility as long as possible, taking decisions at the Last Responsible Moment (LRM) * Evolve towards the optimum solution * Converging on fixed solution behaviours |
| **Sprint** | A time-box of fixed duration (typically 2 weeks but no more than 4 weeks) and of fixed capacity (team size). |
| **Story / User Story** | User stories in agile replace most requirements.   * A User Story is a brief statement of intent that describes something the solution needs to do for the user. * User stories are articulated from the perspective of a ‘persona’ stating what is wanted and why in terms of value. The User Story takes a standard (user voice) form as described in Figure 5. |
| **System Demo** | Demonstration by all teams within an Agile Release Train (ART), of all working software delivered for a system by the end of a Sprint. |
| **System / Scrum Team** | * The System Team provides process and tools to integrate and evaluate assets early and often. * Build the development infrastructure and manage environments; Provide/support full system integration. * Assist with test automation strategies and adoption; Perform end-to-end system and performance testing. * Stage and support the System Sprint Demo. |
| **Team Demo** | Demonstration by an individual team of the working software delivered by the end of a Sprint. |
| **Team Member / Developer (Role)** | Developers write the ‘*code*’ for the story. Within Micro Focus SMAX projects this is typically more configuration and integration.   * Collaborating with product owners and testers to make sure the right ‘code’ is being developed. * Writing ‘code’, configuration and integration. * Writing and executing unit tests. * Writing methods as necessary to support automated acceptance tests and other testing automation. * Checking new ‘*code*’ into the shared repository every day. |
| **Team Member / Tester (Role)** | An integral part of every agile team; from when new ‘*code*’ starts to be laid down, and throughout the release process.   * Writing acceptance test cases while the ‘*code*’ is being written. * Interfacing with developer and product owner to ensure the User Story is understood and to verify acceptance tests. * Acceptance testing. * Checking test cases into the shared repository every day. * Develop ongoing test automation to integrate acceptance and component tests into the continuous testing environment. |
| **Work Package** | Means the work to be undertaken by the parties as set out in this Statement of Work; |

Figure 11 - Definitions

### SAFe® Definition of Done

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Increment** | **System Increment** | **Solution Increment** | **Release** |
| * Stories satisfy acceptance criteria * Acceptance tests passed (automated where practical) * Unit and component tests coded, passed, and included in the BVT * Cumulative unit tests passed * Assets are under version control * Engineering standards followed * NFRs met * No must-fix defects * Stories accepted by Product Owner | * Stories completed by all teams in the ART and integrated * Completed Features meet acceptance criteria * NFRs met * No must-fix defects * Verification and validation of key scenarios * Included in build definition and deployment process * Increment demonstrated, feedback achieved * Accepted by Product Management | * Capabilities completed by all trains and meet acceptance criteria * Deployed / installed in the staging environment * NFRs met * System end-to-end integration, verification and validation done * No must-fix defects * Included in build definition and deployment / transition process * Documentation updated * Solution demonstrated, feedback achieved * Accepted by Solution Management | * All capabilities done and meet acceptance criteria * End-to-end integration and solution V&V done * Regression testing done * NFRs met * No must-fix defects * Release documentation complete * All standards met * Approved by Solution and Release Management |

Figure 12 - Definitions of Done (DoD)

### DoD for ‘Documents’

* Structure, style and format complies with Scaled Agile document standards mutually agreed between the Customer and Micro Focus**.**

### DoD for ‘Backlogs’

* The content of backlogs is as per Scaled Agile document standards that were mutually agreed between the Customer and Micro Focus.
* The default content for backlogs is as per table below:

|  |  |
| --- | --- |
| **Portfolio Backlog** | Lists Epics, Enablers and NFRs   * Strategic Theme it relates to * A name * A description * Primary owner (individual) * WSJF * A light business case * Go / no-go decision |
| **Value Stream Backlog** | Lists Capabilities, Enablers and NFRs   * A name for the Capability or Enabler * A description of the Capability or Enabler * Primary owner (individual) * Cost of Delay (CoD) – relative assessment * An estimate of relative Job Size * WSJF = CoD / Job Size * Once prioritized for action, a light business case is also required. |
| **Program Backlog** | Lists Features, Enablers and NFRs; for each item (where appropriate) there will be:   * A name for the Feature or Enabler * A description of the Feature or Enabler * Primary owner (individual) * Cost of Delay (CoD) from summation of the following 3 components:   + An estimate of relative User / Business value   + An estimate of relative Time Criticality   + An estimate of relative Risk Reduction & Opportunity Enablement * An estimate of relative Job Size * WSJF = CoD / Job Size |
| **Team Backlog** | Lists Stories, Goals and NFRs; for each item (where appropriate) there will be:   * The Feature it relates to * A name for the User Story * The User Story itself following the construct “As a <role>, I can <activity> so that <business value>” * Primary owner (individual) * Supporting detailed that is required, describing the intent of the story, any elaboration from the customer or product owner, and any more detailed behaviour required to implement the story. * Agreed acceptance test(s) to ensure deliverables meet the full intent of the story. * Story point estimate. * Prioritisation from the Product Owner. |
| **Sprint Backlog** | Lists User Stories, Tasks and NFRs; for each item (where appropriate) there will be:   * The Feature it relates to * A name for the User Story * The User Story itself following the construct “As a <role>, I can <activity> so that <business value>” * Primary owner (individual) * Supporting detailed that is required, describing the intent of the story, any elaboration from the customer or product owner, and any more detailed behaviour required to implement the story. * Agreed acceptance test(s) to ensure deliverables meet the full intent of the story. * If needed, a breakdown of tasks to be completed * Story point estimate for any tasks rolled up to a total for the story. * Prioritisation from the Product Owner. |

Figure 13 - Default Content for Backlogs

### DoD for ‘Epics’

* Solution demonstrated,
* Success criteria are met,
* Quality standards met,
* Accepted by Program Portfolio Management.

### DoD for ‘Capabilities’

* Integration testing complete,
* Performance testing complete,
* All required assets checked-in,
* Pre-release checks complete,
* Installed in staging environment,
* Solution demonstrated,
* Acceptance criteria met,
* Quality standards are met,
* Accepted by Solution Management.

### DoD for ‘Features’

* Integration testing complete,
* Performance testing complete,
* All required assets checked-in,
* Pre-release checks complete,
* Installed in staging environment,
* System demonstrated,
* Acceptance criteria met,
* Quality standards are met,
* Accepted by Product Management.

### DoD for ‘User Stories’ / ‘Working Software’

For coding / configuration in meeting user stories, this might include:

* Coding / configuration is complete,
* Unit tests written and executed,
* All required assets checked-in,
* Pre-release checks complete,
* Acceptance criteria met,
* Quality standards are met.

1. If the customer wanted to edit the out of the box e-learning content provided or create additional learning materials (job aids, documentation, working instructions with simulations…) [↑](#footnote-ref-2)