![Ivanti logo]

Ivanti Service Manager – Service Manager Premium Statement of Work

Overview

Ivanti Professional Services will deliver this pre-paid implementation package which is designed to help customers maximize the long-term value of their software. Ivanti will leverage its proprietary delivery methodology and best practices to configure a version of Ivanti Software within the defined deliverables documented herein.

Scope

The Ivanti Service Manager Premium Package provides the customer with a wholistic offering with a comprehensive and robust deployment of Ivanti Service Manager out of the gate across the four ITIL disciplines of Incident, Problem, Request, and Change Management, as well as assisting the customer with the implementation and operationalization of their configuration management database (CMDB) as well as detailed reporting and analytics.

Following industry standards and best practices in regard to ITIL, this package enables the customer to address unplanned interruptions and reduction in quality of IT Services in the form of Incidents, track down and manage recurring Incidents in the form of Problems, fulfill different varieties of Service Requests needs of an organization.

The goal of the Change Management process is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the impact of change-related incidents upon service quality, and consequently improve the day-to-day operations of the organization.

A configuration management database (CMDB) is a repository that acts as a data warehouse for information technology (IT) installations. It holds data relating to a collection of IT assets (commonly referred to as configuration items (CI)), as well as to descriptive relationships between such assets

The self-service portal provides a simple interface and enables users to create, track, resolve, and close incidents and requests for service. Self Service users can also access FAQs, Announcements, and Knowledge Center articles. The Self-Service dashboard is designed to be intuitive and easy to use allowing improved customer satisfaction and higher user-self-resolution.

Ivanti Service Manager	
Component	**Activities and Deliverables**

Infrastructure Stand-up and Configuration	Consultant will install Service Manager application and its components in up to three (3) environments – Development, UAT, and Production.
	
	Premise Install to Development, UAT, and Production Environments
	• Active Directory Integration
	    o One (1) Active Directory Mapping
	    o SSO Configuration with Customer SAML provider – (e.g. Okta, ADFS)
	• Email Integration per module
	    o SMTP Configuration
	    o Email Listeners

Planning and Design Workshops/Document Generation	Project Scoping, Workshop and Design: Ivanti Service Manager Software, working with Customer personnel, will conduct a Workshop to further define Customer requirements. **Planning & Design Meeting** The Planning and Design Meeting includes all the tasks required to meet with the project's key stakeholders and determine the final design of the system prior to beginning the software implementation. **High level work breakdown structure:** • Discussion of Objective and Strategy • Long Term Goals and Objectives • Data Model (Users, Groups, Customers, Filters, Partitioning, CI's etc.) • Implementation Model • Workshop Preparation **Design Document:** Consultant will generate design documentation defining the specifics of configuration work to be performed as well as any future work to be proposed as agreed to during the design workshop. This document will be used to govern implementation of Customer's Solution as well as to serve as the basis of estimation of proposed future implementation work if required. **Design Review:** Discuss and document the conceptual design based on specific needs and objectives, as well conduct design review meeting to discuss and identify any gaps.
Incident Management	An *Incident* is an unplanned interruption or reduction in quality of an IT service, or a break in the standard operation of a *Service*. The system records the details of an *Incident* and its complete history from registration to resolution in an *Incident* record. The goal of Incident Management is to restore normal service as quickly as possible when IT service has been disrupted, and to make sure that business operations are functioning normally. The definition of normal service is agreed in Service Level Agreements (SLAs) with the customers of your organization. Incident Management reduces or eliminates the effects of potential disruptions in IT services, so that users can get back to work as soon as possible. To achieve this end, Incidents are recorded, classified, assigned to specialists, and progress monitored until they are resolved and closed. SLAs and escalations (in the absence of SLAs) ensure that Incidents are responded to and resolved on time with satisfactory resolution rates. **Design Workshop** Attendees: Service Desk Manager, Service Desk Analysts, Incident Process Owners Discussion Items: • Incident Management Ticketing Processes • Priority Model • Incident Status Values and Transitions • Triaging and Functional Escalations • SLA's (response and resolution) • Tasks/Assignments • Activity History • Notifications • Searches

	• Templates
	• Dashboard
	• Roles and Security
	    o Service Desk Analyst Role, Service Desk Manager
	    o Facilities Roles
	• Relationships with other modules
	    o Problem, Self Service, Knowledge, Etc.
	• Reference Data
	
	Configure and Review Incident Management:
	• Configure one (1) Incident Management Workflow process using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
	• Implementation of Incident typically includes the following features:
	    o Create an Incident
	    o Status Lifecycle
	    o Customer relationship configuration to an Incident
	    o Priority configuration
	    o Two-level categorization – Services and respective Categories
	    o Create and assign Tasks to resolve the Incident
	    o Create Journals
	    o Add Attachments to Incident
	    o Resolve Tasks by updating status
	    o Automated email template process for new Incident logged
	    o Automated email template process for resolution or closure of an Incident
	    o Automated email template process on creation of Assignment
	    o Close Incident Process
	    o Create Dashboard with View/drill for Incident Process
	    o Configure SLA including Response and Resolution times by Service
	    o Review and configure settings for Audit History
	    o Review and Enable out of the box Surveys if applicable

Self-Service Portal	The Self-Service portal can be used by requesters (end-users) and Service Owners. The Self-Service dashboard provides a simpler interface and enables users to create, track, resolve, and close incidents and requests for service. Self-Service users can also access FAQs, Announcements, and Knowledge Center articles. The Self-Service dashboard is designed to be intuitive and easy to use
	
	Attendees: Service Desk Manager, Service Desk Analysts, Incident Process Owners
	
	Design Workshop:
	
	Discussion Items
	• Self-Service URL
	• Creating Incidents
	    o Adding Attachments
	    o Adding Activity History / Notes
	• Self-Service Dashboard
	• Knowledge Base Search

	Configure and Review Self-Service:
	• Configure one (1) Self-Service Portal using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
	• Implementation of Self-Service typically includes the following features:
	    ○ Configure Self-Service portal for end users to log and view an Incident or Request
	    ○ Configure Self-Service for ability to check status of an Incident or Request
	    ○ Configure Self-Service layout, links, dashboard

Knowledge Management	The primary role of Knowledge Management process is to improve the quality of decision making by ensuring that accurate, reliable and trustworthy information is available throughout the Service lifecycle. Knowledge Base is a collection of articles describing solutions and answers to Service Desk questions.
	
	ITIL defines Knowledge Management as the one central process responsible for providing knowledge to all other Ivanti processes. In Ivanti, knowledge works with Incident Management and Problem Management and is a powerful feature in the Self-Service Portal. Knowledge enables users of the support service to serve themselves by searching, browsing, or asking for a solution to their problem or questions.
	
	Design Workshop:
	
	Attendees: Service Desk Manager, Service Desk Analysts, Knowledge Manager
	
	Discussion Items:
	• Knowledge Management Process
	• Record Attachments
	• Knowledge Article Types
	• Approval Process
	• Knowledge Collections
	• Roles and Security
	
	Configure and Review Knowledge Management:
	• Configure one (1) Knowledge Management Process using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
	• Implementation of Knowledge typically includes the following features:
	    ○ Creating Knowledge Articles
	    ○ Approval process
	    ○ Types of Articles
	    ○ Publishing and categorizing an article
	    ○ Searching Knowledge Management
	    ○ Any Data to be imported into Knowledge Management will use Service Manager approved format (e.g. CSV Files) and application-based tooling.

Problem Management	A Problem is identified by multiple Incidents showing common symptoms or a single Incident with no known cause. The primary objectives of Problem Management are to prevent incidents from happening, and to minimize the impact of incidents that cannot be prevented. An Incident may be used to identify a Problem when there are multiple reports of the same failure, or when there are recurring Incidents that affect

the same Services or Configuration Items (typically, hardware items or software solutions).

Design Workshop:

Attendees: Service Desk Manager, Service Desk Analysts, Incident Process Owners

Discussion Items:
- Dashboards
- Problem process and Roles
- Status Transitions
- Linking to Incidents
- Linking to Changes
- Linking to CI's

Configure and Review Problem Management:
- Configure one (1) Problem Management Process using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
- Implementation of Problem typically includes the following features:
  - Create Problem
  - Status Transitions
  - Update Subject, Description and Error Message
  - Problem Categories
  - Priority determined by Urgency and Impact
  - Add Workaround information
  - Identify Known Error
  - Record the Root Cause of Problem
  - Create Tasks to resolve the Problem
  - Ability to Create Activity History
  - Add Attachments to Problem
  - Link additional Incidents to the Problem
  - Close the Problem

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Change Management	The goal of Change Management is to ensure the use of standardized methods and procedures for handling Change Requests, minimizing the impact of Change-related issues, and improving daily operations. Change Management is the process of assessing and detecting any impact and potential risk that a proposed change could inflict on your organization. Successful Change Management minimizes the impact of change-related issues and improves daily operations.
	
	Design Workshop
	
	Attendees: Change Managers, Change Coordinators, Change Process Owners
	
	Discussion Items:
	• Change Management Process
	• Dashboard
	• Searches
	• Change Status and Transitions
	• Change Process Types to include the following:
	  o Customer Defined Change Process
	  o Standard

	o Emergency
	    o Minor
	 • Notifications
	 • Approval Workflow
	    o Contact Groups
	 • Roles and Security
	 • Change Calendar
	 • Linking CI's, Problems, Services
	 • Problem and Incident interactions
	
	Configure and Review Change Management
	 • Configure up to one (1) IT-Based Change Management Processes containing up to two (2) Levels of approval and up to five (5) Tasks.
	 • Change processes will be implemented using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
	 • Implementation of Change typically includes the following features:
	    o Create Change Record
	    o Change Types
	    o Notifications of Change Record to Change Coordinator
	    o Change Coordinator review of Change
	    o Member Setup for Change Advisory Board (CAB)
	    o Change Approval Process
	    o Change Category and Justification
	    o Create Tasks associated to Change
	    o Ability to Create Activity History
	    o Change Calendar
	    o Ability to view Change on Change Board
	 • Change types detailed in this SOW will be for IT-Based Changes and will not include integration with third-party products

Configuration Management	*Configuration Management* is the process used to maintain information about configuration items required to deliver an IT service, including their relationships. *Configuration Items* (CIs) are generally any component of an IT Infrastructure and typically include IT Services, hardware, software, buildings, people and formal documentation such as Process documentation and SLAs. Information about each CI is recorded in a configuration record and is maintained throughout its Lifecycle by Configuration Management. **Design Workshop:** Attendees: Change Process Owners, Service Desk Manager, Asset Managers Discussion Topics: • Configuration Management workspace • Dashboard • Searches • CI Types • Linking CI's to Incident, Problem, and Change • Reference Data CI Import **Configure and Review Configuration Management** • Configure CMDB using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.

	• Implementation of CMDB typically includes the following features:
	   ○ Configure CI types
	   ○ Import data for up to Three (3) CI types from Customer's existing solutions (e.g. ALM, Asset Manager data) in the Service Manager approved format (e.g. CSV files) using ISM tooling
	   ○ Configure CI import connection and Remote-Control tool with Ivanti Endpoint Manager

Request Management\Service Catalog	A *Request Offering* is an item that describes the item, assistance, or action available to *Self-Service* users from the *Service Catalog*. *Request Offerings* are normally placed in logical groups of *Services*.
	
	The *Service Catalog* lists all *Request Offerings*, such as requests for software, computers, or other requests for non-IT related services provided in your organization. The *Service Catalog* is how customers order products and services. You control the customer experience within the *Service Catalog*, defining for each item an image, description, price, other fields, and workflow.
	
	Design Workshop:
	
	Attendees: Service Desk Manager, Service Desk Analysts, Department Liaisons
	
	Discussion Items:
	• Service Catalog – Self-Service Portal
	• SLAs\OLAs for Request Management
	• Request Offering Types
	• Approval Workflow Process
	• Task Workflow Process
	• Notifications
	• Status
	• Roles and Security
	
	Configure and Review Request Management and Service Catalog
	
	• Configure the following Service Catalog Request Offerings as defined by Customer using framework, specifications, and configuration Changes agreed to during the design workshop and per the design document.
	• Work will be based on OOTB templates where appropriate
	   ○ Configure up to two (2) low- Complexity Service Requests - (5 fields, no approvals, up to 5 tasks)
	   ○ Configure up to three (3) Medium- Complexity Service Requests - (10 fields, 1 approval, up to 10 tasks)

Dashboards and Reports	• Configure up to two (2) Dashboards and\or Reports using framework, specifications, and configuration changes agreed to during the design workshop and per the design document.
User Validation Testing	The last phase of the software testing process. UVT will focus on testing Ivanti Service Manager in real-world scenarios. During this phase the Customer will run through a series of tests and note defects and or/modifications necessary to fulfill the agreed to design of the solution. Issues will be logged by Customer and then remediated by the consultant.

	Successful testing of the agreed to system design will constitute acceptance criteria in relation to the configured solution. The following Customer responsibilities during UVT unless otherwise agreed to: • Create Test Plans using either Ivanti Provided documentation or internal documentation • Perform \System Testing • Document Defects and modifications needed and escalate as required • Schedule internal resources to conduct UVT **System Testing:** Test all Configured features and functions for documented behavior. Perform empirical investigation of each feature and service to validate the state and behavior of the product against the Service Manager specification, detect any software failures, and ensure the satisfaction of Customer requirements. The Following are Consultant Responsibilities during UVT unless otherwise agreed to: • Make agreed to and necessary configuration changes and defect remediation as required from UVT testing.

ISM Functional Review	The *Knowledge Transfer –a*ctivities will focus on educating the Customer on the fundamental concepts of Service Manager components while providing demonstration and answering questions.
	
	Conduct up to two (2) Sessions - Up to three (3) hours each to review the as configured solution with Customer resources. Topics covered in these sessions include, but not be limited to, the following:
	• Service Manager Premise / Cloud
	   o Customer-Specific Workflow Configuration
	   o Day to Day Administration
	   o Best Practices
	   o Ad-Hoc Question and Answer
	
	Planning Meeting: Meet with Customer key stakeholders to determine prioritized objectives for the allotted amount of time
	
	Create Agenda: Determine and agree upon a suitable agenda
	
	Perform Activities: Engage with Customer to perform mutually agreed upon agenda items.
	
	Note: Completion of any planned activities is subject to the time constraints set forth in this SOW and completion of specific activities cannot be guaranteed unless agreed to in advance and does not include training documentation. This is not a replacement for formal training.

Go-Live Support	"Go live" takes place at the end phase or completion of the project. The presence of a vendor consultant/deployment engineer will provide the customer project team and users of the solution with extra support and a source of expertise. The following activities are included in this section: **Phase - Go-live – up to twelve (12) hours** • Clear Test Data • Communicate to Customers • Provide Go-Live Support

Ivanti Project Management

Ivanti project managers have many years of experience delivering both simple and complex IT projects. Over the years, Ivanti has developed a complete project management methodology, fully scalable and designed to deliver projects successfully, on budget and on time. With Ivanti implementation packages, Ivanti guarantees a successful outcome for a fixed price, unless otherwise stated in this Statement of Work. For implementations, Ivanti applies a tried and tested methodology which yields tangible value to Customer's organization. The methodology has five well-defined phases as described below:
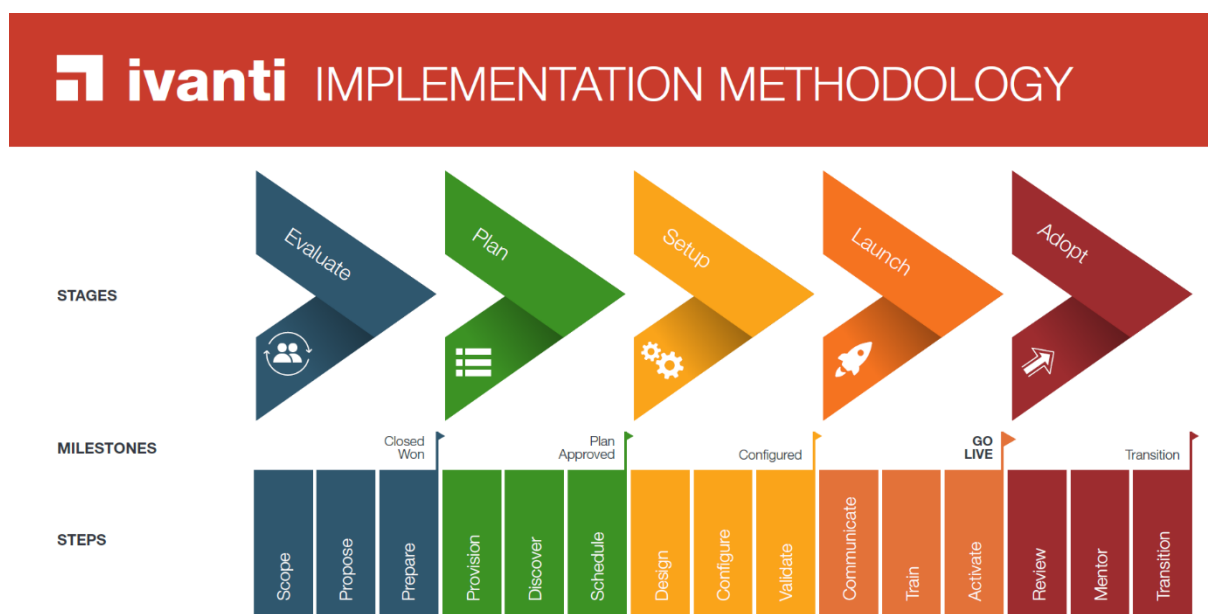
Assumptions

A successful implementation assumes a collaborative work effort by both parties. Ivanti will provide configuration, best-practice guidance, knowledge transfer and implementation oversight leading to the completion of the deliverables. Customer will provide and ensure reasonable availability of a core implementation team including an executive sponsor, project manager, subject matter experts, and system administrators. Customer will also:

- provide relevant application and process documentation, and assist with information, as deemed necessary, as it relates to the Ivanti product(s). Ivanti will define required documentation as appropriate;
- provide agreed physical and logical infrastructure as well as appropriate access, including site access, to the Ivanti consultant as necessary to enable the completion of required tasks;
- purchase and provide licenses for all products that are included in the scope of this Statement of Work.
- provide sufficient notice for rescheduling. Rescheduling requires a minimum of 10 business days' notice. Failure to notify Ivanti of need to reschedule can result in additional charges as stated in Services Terms and Conditions. Customer may also incur a 4-6-week delay in project duration.
- Unless otherwise stated in the Deliverables section above integrations between Ivanti or third-party products is not within the scope of this Statement of Work.

Travel

Ivanti services are typically delivered remotely but may include limited onsite delivery. Onsite delivery will be at the sole discretion of Ivanti. Ivanti will cover all travel costs related to onsite delivery of services unless otherwise specified in writing or detailed in the quote for services.

Warranty

Completion of the deliverables by Ivanti occurs when the items above have been configured, suitably tested, and handed off to the Customer. Customer has thirty (30) days from date of delivery to test the deliverables and report any problems. After the thirty (30) day period, this project will be regarded as complete. In the event any deliverable is utilized for production purposes the deliverables shall be deemed accepted.

Term

This Agreement shall commence on the date of last signature or the date of acceptance of the online terms and/or Statement of Work, whichever is later, and shall remain in force until Ivanti completes relevant deliverables defined above; or 12 months have elapsed since the date that Customer placed the order unless terminated in accordance with this agreement.

Ivanti Project Resources

Ivanti may choose to utilize the services of our qualified partners to complete the services. These partners are experienced with Ivanti product implementation. While on contract to Ivanti, our partners are fully recognized and supported as an extension of Ivanti's Professional Services Group.

References

All references to "Customer" shall mean the customer identified below. All references to "**Ivanti**" or "**Consultant**" shall mean the entity identified below in the same geographic region as Customer:
- Ivanti, Inc., a Delaware corporation, in the Americas, except Brazil.
- Ivanti Comércio de Software Brasil Ltda, a Brazilian company, in Brazil.
- Ivanti Software K.K., a Japanese company, in Japan.
- Ivanti Software Technology (Beijing) Co., Ltd., a Chinese company, in China.
- Ivanti International Limited, an Irish company, for Wavelink and Naurtech branded products and services in Europe, the Middle East, Africa, and the Asia Pacific region.
- Ivanti UK Limited, a limited company registered in England and Wales, in all other locations.

Authorization

In addition to any terms contained in this statement of work package ("Statement of Work"), the provision of the professional services described in this Statement of Work (the "Services") shall be subject to either (i) the Ivanti End User License and Services Agreement agreed to by the parties, (ii) the terms and conditions of a separate written agreement which contemplates Customer's purchase of services like the Services in this Statement of Work, or (iii) the Ivanti Professional Services Terms and Conditions found at http://www.ivanti.com/en-US/company/legal/professional-services and are hereby incorporated by reference.

Services under this Statement of Work shall be delivered on a prepaid basis which will be invoiced upon receipt of a purchase order.

Neither the execution nor fulfillment of the Services will relieve or alter Ivanti or Customer's rights or obligations with respect to standard Ivanti software and other products under the license agreements applicable to such software or products. Nothing in this document is intended to or shall have effect of vesting in or transferring to Customer's rights in Ivanti's, its affiliates' or its suppliers' software, methods, know-how or other intellectual property, regardless of whether such intellectual property was created, used or first reduced to practice or tangible form by Ivanti in the course of performance of the Services hereunder. By purchasing the Services set forth in this Statement of Work, the parties each indicate their acceptance of the above.

Customer Name:
Customer Address:

On Behalf of Customer	
Signature	
Email	
Title	
Date	

On Behalf of Ivanti	
Signature	DocuSigned by: *Al Arun*
Email	287267931CDA4A4 AT.arun@ivanti.com
Title	Vice President, Professional Services
Date	