

ID	Requirement	Priority	Category
R006	Product must be able to report on licensing information for any software products tacked in the system. Report must include, but is not limited to, price, purchase order number, total number of licenses purchased, number of licenses in use, number of licenses available, contract and renewal terms, etc.	Must have	Asset Reporting
R076	Product must allow the agency to create and run reports on exemption information stored in the system	Must have	Asset Reporting
R007	Product must be able to track licensing information for any software products purchased by the agency. Tracking elements must include, but is not limited to, price, purchase order number, total number of licenses purchased, number of licenses in use, number of licenses available, contract and renewal terms, licensing key info, etc.	Must have	Asset Tracking
R008	Product should have the ability to record or keep track of groups of software used by the agency in the various install images, so we can more accurately track which group needs which software. For example, the main base software image, ITS developer image, etc.	Optional	Asset Tracking
R009	Product must be able to track relevant information for hardware products purchased by the agency. Report must include, but is not limited to, total number of licenses purchased, number of licenses in use, number of licenses available, contract and renewal terms, etc.	Must have	Asset Tracking
R011	Product must allow the agency to assign assets to specific staff members, so we have an accurate record of who assets are assigned to. This needs to include specific staff members, and the departments they work for in the agency.	Must have	Asset Tracking
R012	Product must allow the agency to query asset information by asset and/or by staff member. For example, if we look up an asset, we want to see who all is assigned that asset. If we look up a staff member, we want to see everything assigned to the staff member.	Must have	Asset Tracking
R018	Product must work with barcode scanning software to scan assets into the system.	Optional	Asset Tracking
R075	Product must allow the agency to track additional asset information related to exemptions with the state data center. For example, is an exemption required, is there an active exemption with start and end dates.	Must have	Asset Tracking
R044	Product must have a built in change management module, or the ability to create a change management process including change approvals, change calendars, workflows, and change tracking.	Must have	Change management
R001	Product must allow users to create custom ad-hoc reports, with the ability to save these reports to run again in the future.	Must have	General Reporting
R002	Reports must pull live data from the system.	Must have	General Reporting
R003	Reports must be securable by role, or suser group, so only users that need to see the info are able to.	Must have	General Reporting
R004	Reports must be shareable by role, user group, or via email, so reports can be sent to those that need to see them.	Must have	General Reporting
R005	Product must allow users to create, save, and share custom dashboards.	Must have	General Reporting
R010	Reporting capabilities must include the ability to drill down to more specific details on data elements. For example, drill down on agency assets to show the assets assigned to a specific department to determine how much the department's assets cost.	Must have	General Reporting
R063	Reports generated in the product must be exportable to CSV, XLSX, PDF, etc.	Must have	General Reporting
R073	Product must be allow the agency to create and distribute scheduled reports. For example, a weekly report sent to managers showing all new tasks created, or how many tickets are open past their SLA date.	Must have	General Reporting
R074	Product must have configuration management database (CMDB) capabilities, so the agency can store our IT configuration and infrastructure information in one location.	Must have	General Reporting
R028	Product must allow the agency to customize the look and feel to fit our agency's branding. For example, color scheme, fonts, logos, etc.	Optional	General System

R039	Product user interface must be intuitive and designed to allow users with different level of technology skill sets to quickly become familiar with the system interfaces and functions.	Must have	General System
R043	Product must have a user friendly search feature which searches all information in the system (tickets, tasks, assets, projects, etc.) so staff can easily find relevant information stored in the system.	Must have	General System
R061	Product must be able to integrate or interface with other software platforms. This includes, but is not limited to Outlook, Active Directory, Exchange Server, Azure DevOps, barcode scanning software, etc.	Must have	General System
R062	Product must allow single sign-on via Azure AD	Must have	General System
R066	Product must be accessible on mobile devices.	Must have	General System
R067	Product must have the capability for staff to submit a ticket by sending an email to a specific Outlook resource email box, with a specific subject line.	Must have	General System
R068	When a staff member enters a ticket, the product must populate the ticket with relevant submitter information from Active Directory. For example, staff name, email, phone number, PC number, etc.	Optional	General System
R069	When a staff member calls in a ticket, the product must populate the ticket with relevant submitter information from Active Directory. For example, staff name, email, phone number, PC number, etc.	Optional	General System
R070	Product must have an intuitive way to view and retrieve any attachments on a ticket. Attachments must be retrievable from a task generated from the ticket.	Must have	General System
R071	Records in the system must have a unique identifier, so incident and task numbers don't overlap.	Must have	General System
R072	Product should be able to facilitate two-way communication between the submitter and person working the ticket.	Optional	General System
R077	Product must provide role-based access controls to allow the agency to create multiple access roles, based on a staff member's interaction with the product.	Must have	General System
R078	Product must have the ability to support accessibility requirements.	Must have	General System
R041	Product must have knowledge base capabilities, so we can build a knowledge base from information entered into the system. This can include, but is not limited to, issue resolutions, procedures for installing software assets, troubleshooting steps, FAQs, etc.	Must have	Knowledge Base
R042	Knowledge base must have a user friendly search feature, so staff can easily find relevant information stored in the system.	Must have	Knowledge Base
R064	Product must have the ability to store documentation related to tickets, tasks, projects, etc.	Must have	Knowledge Base
R025	Product must include a mass notification component, so the agency can notify all staff in the event of a system outage.	Must have	Mass Notifications
R026	Mass notification component must allow the agency to create and maintain notification groups, to allow us to send notifications directly to those impacted.	Must have	Mass Notifications
R013	Product must allow the agency to create and manage templates end users can use to submit tickets in the system to standardize information received on different types of tickets.	Must have	Ticket Tracking
R014	Product must allow tickets to be assigned to different teams within the agency, and to specific individuals on those teams to allow us to distribute tickets to the staff who need to do the work.	Must have	Ticket Tracking
R015	Product must allow tasks to be created from a ticket, so portions of work can be assigned to the specific staff who need to do the work.	Must have	Ticket Tracking
R016	Product must allow tasks to be assigned to different teams within the agency, and to specific individuals on those teams to allow us to distribute tickets to the staff who need to do the work.	Must have	Ticket Tracking

R017	Ticket and task assignments must be securable by role, so only people who need to see the ticket or task can see it and make updates as needed. Security must include options for read-only and edit access.	Must have	Ticket Tracking
R027	Product must include a robust ticketing system the agency can use to track issues, new technology requests, projects, assets, and other relevant information as needed.	Must have	Ticket Tracking
R031	Product must allow the agency to categorize and tag tickets to allow us to better identify and track different issues and initiatives.	Must have	Ticket Tracking
R032	Product must allow the agency to create and maintain various Service Level Agreement (SLA) timeframes for different ticket or task types.	Must have	Ticket Tracking
R033	Applicable SLA information must be viewable on each ticket or task.	Must have	Ticket Tracking
R037	Product must have ticket and task dashboards which show all of the tickets or tasks based on configurable criteria. For example, all unassigned tickets, or tickets assigned to a group or staff member.	Must have	Ticket Tracking
R038	Columns in the ticket and task dashboards must be sortable and filterable with the ability save the settings.	Must have	Ticket Tracking
R040	Ticket and task records must be configurable and customizable to allow us to collect the information needed on the ticket. This includes, but is not limited to, creating data-driven drop down fields and other customizable fields, with the ability to require specific fields be filled out.	Must have	Ticket Tracking
R019	Product vendor must train key agency staff on how to administer the product.	Must have	Training
R020	Product vendor must train key agency staff on how to create and maintain ticket templates in the product.	Must have	Training
R021	Product vendor must train key agency staff on how to create and maintain templates, reports, and dashboards in the product.	Must have	Training
R022	Product vendor must train key agency staff on the daily use of the product.	Must have	Training
R023	Training must include hands-on training classes.	Must have	Training
R024	Product vendor must provide the agency with training materials such as, training manuals, training videos, how-to guides, FAQs, etc.	Must have	Training
R029	Product must allow the agency to create automated, business rule based workflows, to remove manual routing processes.	Must have	Workflows/Automation
R030	Product must send email notifications to staff, based on actions taken on tickets. For example, staff receive an email when they are assigned to a ticket or a task.	Must have	Workflows/Automation
R034	Product must send email notifications to staff, based on SLA information. For example, staff receive a reminder email if a deadline passes.	Must have	Workflows/Automation
R035	Language in automated emails sent by the Product must be configurable by the agency.	Must have	Workflows/Automation
R036	Agency must be able to include certain key fields from the system in the automated emails. For example, ticket number, assigned staff member's name, submitter's name, etc.	Must have	Workflows/Automation