ANNEX 7 – Use Cases

Reader's guide

This appendix contains six use cases that must be demonstrated by the participating suppliers during the demonstration sessions. The purpose of the demonstrations is to provide insight into how the proposed solution supports the described scenarios and aligns with the organization's needs and requirements.

The attendees of the demonstrations will assess the suppliers based on the presentation and execution of these use cases as described in the Invitation To Tender. The assessment includes different aspects such as usability, flexibility, user friendliness and the extent to which the solution fits the described situations.

<u>Proposed demonstration session agenda</u>
The demonstration session will have a total duration of 2,5 hours (150 minutes). Suppliers are expected to provide a realistic and representative demonstration of the proposed solution and how it can be applied in practice.

The supplier will be given the opportunity to briefly introduce the organisation and the project team. The main objective of the session is to obtain maximum insight into the operation of the proposed solution through the predefined use cases. Therefore, the focus of the demonstration should be on the practical execution of these use cases.

The time is to be structured as follows:

- Brief introduction of the supplier and project team (+- 15 minutes)
- Demonstration of the 6 use cases (+- 90 minutes)
    - The demonstration should be as practical and scenario based as possible.
    - The supplier is suggested to distribute the available time evenly across the use cases, but are free to determine the time per use case. This means that suppliers may decide how much time is allocated to each use case and which additional explanations they consider relevant within the provided timeframe of the demonstration. However, keep in mind that all use cases will be scored.
- Follow-up questions and additional demonstrations (45 minutes)
    - The possibility to ask additional questions and/or request the supplier to further elaborate on or demonstrate specific functionalities, processes, or aspects of the solution.

The supplier is expected to ensure that the demonstration is well prepared and directly aligned with the use cases described in this document.

1. Use Case 1: Introduction to ESM configuration possibilities

1.1 Scenario

A functional administrator is responsible for configuring and maintaining the governance structure of the ESM platform. During the demonstration, the supplier should show how the platform supports role-based access control, service and agent group configuration, data governance, and portal configuration across domains.

The administrator configures roles and permissions for different user types, such as students, employees, HR staff, managers. Important to show is the access for the guest users who don't have an account at TU/e.

The supplier should demonstrate how permissions can be configured at multiple levels, including:

- Entity level (tickets, services, knowledge base and its items);
- Restricting HR tickets to authorized users only;
- Hiding sensitive HR fields based on user roles;
- Different portal experiences for internal (=employee) and external (=prospect student) users;
- Guest account functionality and limited access scenarios.

The demonstration should further show how services are linked to responsible groups, including ownership, workflows, SLAs, and escalation paths. In addition, the supplier should demonstrate data retention and compliance capabilities, including automated archival or deletion based on configured policies.

Finally, the supplier may additionally demonstrate how AI capabilities support governance by identifying permission anomalies, recommending optimizations, and providing governance insights.

1.2 Demo topics and tasks

Topic	Please demonstrate
Governance & Administration	General system administration capabilities (entities) Configuration of roles, agent groups, and permissions Auditability and traceability of changes
Role-Based Access Control (RBAC)	Role and agent group management Permissions at entity, field, and action level Restriction of HR and Security data
Sensitive Data & Guest Access	Hiding sensitive HR fields Role-based visibility of entities Guest accounts and restricted external access Different portal views for internal and external users
Service & SLA Configuration	Service catalogue configuration Linking services to responsible groups SLA and priority configuration Escalation and routing rules
Data Governance & Compliance	Retention policy configuration Automated archive/delete actions Audit logging and compliance support
AI & Continuous Improvement	AI recommendations for governance and permissions Detection of anomalies or risks Feedback and reporting capabilities for service improvement

2. Use Case 2: End-to-End Ticket Journey (Submission > Completion)

2.1 Scenario

A user accesses the ESM self-service portal via web browser or mobile app. Upon login, the user selects an active role, which determines the available services, forms, and permissions based on role-based access control (RBAC).

Before creating a ticket, the user searches the knowledge base and portal content for relevant information. If no suitable solution is found, the user selects a service from the service catalogue, which provides a webshop-like experience with structured service offerings.

Upon ticket creation, the form dynamically adapts based on the selections made by the customer. Contextual help, tooltips, and knowledge suggestions support the user throughout the submission process. The user can save the request as a draft and continue later.

After submission, the user can track the ticket through a visual workflow representation, showing the current status, responsible team or agent, and historical actions. Throughout the lifecycle, the user receives notifications, adds comments or attachments, and can pause or reopen the ticket within configured rules.

Finally, the ticket is resolved and closed, after which the user can provide feedback through a survey or rating mechanism. The full audit trail remains available throughout the complete lifecycle of a ticket.

2.2 Demo topics and tasks

Topic	**Please demonstrate**
Ticket Creation	Create a ticket via portal for yourself and on behalf of another user Select service from webshop-style catalogue Complete a dynamic form Show role-based form adaptation Demonstrate tooltips, inline help, and knowledge suggestions Save ticket as draft and resume later
Access & Role-Based Personalization	Log in with a user having multiple roles Select and switch roles Show impact on visible services, forms, and content
Search & Self-Service	Perform search query in the portal Show relevant knowledge base results Demonstrate contextual suggestions
Omnichannel Communication	Add updates via portal, email, and chatbot Show all communication consolidated in one ticket
Ticket Submission & Tracking	Submit a ticket Show workflow/progress visualization Display current responsible party Show ticket history and timestamps
Ticket Interaction	Add comments and attachments Pause and reopen a ticket Show notifications and communication updates
Closure & Feedback	Resolve and close ticket Show feedback or survey functionality Display full audit trail
AI & Smart Guidance	Demonstrate contextual or AI-assisted suggestions Show smart categorization, autofill, or user guidance

3. Use Case 3: Ticketing Communication & Omnichannel Experience

3.1 Scenario

A user has an active ticket and communicates about it through multiple channels, such as the self-service portal, email, mobile app, telephone and chatbot integration (e.g., Microsoft Teams). During the demonstration, the supplier should show how all communication and updates are automatically consolidated into a single ticket view, ensuring a consistent and seamless user experience.

The user should be able to configure personal notification preferences, such as email or push notifications, and receive updates through the selected communication channel.

The supplier should demonstrate how the platform supports major incident communication, including, announcements, status updates, and “I am affected” functionality.

The demonstration should also include role-based news and announcements in the portal, mobile usability, optional ticket sharing functionality, and support for guest or external users without an organizational account. Guest users should be able to submit and track tickets securely via portal or email.

The platform should ensure consistent communication across all channels without duplication of information and provide secure and controlled access for all user types.

3.2 Demo topics and tasks

Topic	Please demonstrate
Omnichannel Communication	Create a ticket via portal/chatbot Add updates via portal and email Show all communication consolidated in one ticket
Notification Preferences	Configure notification preferences Trigger ticket updates Show notifications via selected channels
Mobile Experience	Open and manage ticket in mobile app Add comments or updates Show mobile usability and responsiveness
Major Incident Handling	Create or simulate a major incident Show mass communication and announcements Demonstrate “I am affected” functionality Show real-time status updates
News Functionality	Display portal news and announcements Show role-based personalization
Guest / External Users	Submit ticket without organizational account Show communication via email Demonstrate ticket tracking for guest users
Ticket Sharing (Optional)	Share a ticket with another user Show access restrictions and security controls
AI & Automation	Demonstrate chatbot capabilities Show smart notifications or automated communication features

4. Use Case 4: Agent Experience

4.1 Scenario

An agent logs into the ESM platform and lands on a personalized dashboard showing individual and team workload, priority tickets, SLA indicators, and tickets being followed. Tickets arrive through multiple channels (e.g. telephone) and are consolidated into a single queue.

During the demonstration, the supplier should show how agents efficiently manage tickets throughout the complete lifecycle. The agent should be able to prioritize work using dashboards, filters, and SLA indicators while collaborating with other teams when needed.

The supplier should demonstrate how the platform supports centralized communication with customers through comments, chat, and call logging. AI capabilities should support the agent by generating ticket summaries, suggesting responses or next actions, and recommending or creating knowledge articles based on resolved tickets. The demonstration should also show escalation from 1st line to 2nd line support, management of priority, urgency, and impact, and linking assets or related services to tickets.

Special attention should be given to role-based permissions and restricted access scenarios, such as HR tickets only being visible to authorized agents.

Finally, the supplier should demonstrate reporting, dashboards, and performance tracking capabilities for both individual agents and teams.

4.2 Demo topics and tasks

Topic	Please demonstrate
Agent Dashboard & Workload	Show personalized agent dashboard Show individual and team workload Display priority tickets, SLA indicators, and watched tickets
Ticket Intake & Channels	Create tickets via email, chat, and phone logging Show unified ticket queue and consolidated ticket view
Ticket Handling	Open and manage a ticket (process, delegate, linking, merging, etc) Show AI-generated ticket summaries Demonstrate suggested responses or next actions Add public comments ad internal notes
Communication	Demonstrate communication with end users Show chat integration and call logging Display full communication history in one ticket
Escalation & Prioritization	Escalate ticket from 1st to 2nd line support Change priority, urgency, and impact Show SLA impact and tracking
Asset Linking	Link assets or services to tickets Show relationships between tickets, users, and assets
Knowledge Creation	Create knowledge article from resolved ticket Show lifecycle from draft to published article
Permissions & Security	Demonstrate restricted ticket visibility (e.g., HR cases) Show role-based access control for agents
Reporting & Dashboards	Show agent and team reporting Build or configure a simple dashboard
AI & Automation	Demonstrate AI summaries and response suggestions Show AI-supported knowledge generation Demonstrate smart prioritization support

5. Use Case 5: Agent-Controlled Workflow & Form Configuration

5.1 Scenario

An agent or super user is responsible for managing and optimizing workflows and request forms within a specific service domain, such as IT or HR. During the demonstration, the supplier should show how forms, workflows, SLAs, dashboards, and notifications can be configured without requiring development or technical coding skills following a four eyes principle. Additionally, the solution should support value chain management and enable end-to-end orchestration of processes across different systems and departments.

The supplier should demonstrate how agents can create or modify request forms by adding fields, defining mandatory fields, configuring conditional logic, and controlling field visibility based on user roles or permissions.

The demonstration should also show how workflows can be adjusted through a visual workflow designer, including the configuration of approvals, escalations, automation rules, and SLA-related actions.

Changes should be version-controlled, securely managed, and applied without disruption to existing operations. The supplier should demonstrate how authorized users can test, deploy, or roll back changes when needed.

5.2 Demo topics and tasks

Topic	**Please demonstrate**
Form Configuration	Open form editor Modify existing form Add or remove fields Configure mandatory and conditional fields Show field visibility based on role Show impact on ticket creation
Workflow Configuration	Open workflow designer Modify workflow steps Add approvals and escalation rules Demonstrate automation and integration/orchestration capabilities Show visual workflow configuration
Permissions & Governance	Show who can modify forms and workflows Demonstrate restricted access Show auditability of changes
Version Control	Show version history Demonstrate rollback functionality
Testing & Deployment	Show how configuration changes are deployed Optional: demonstrate test/UAT environment
SLA Configuration	Configure SLA rules Show SLA applied to tickets or workflows
Dashboard & Reporting Configuration	Create or modify dashboard Add metrics, widgets, or filters Show configurable reporting capabilities
AI & Optimization	Demonstrate AI-assisted workflow or form suggestions

6. Use Case 6: Manager Insights, Workload Management & Approval Flow

6.1 Scenario

A manager is responsible for overseeing one or multiple service teams within the ESM platform. Upon accessing the system, the manager is presented with a dashboard-driven overview showing team workload, individual performance, SLA compliance, backlog, trends, and potential risks or bottlenecks.

During the demonstration, the supplier should show how managers can use dashboards and reporting capabilities to monitor operational performance, identify overloaded teams, and make data-driven decisions regarding prioritization and resource allocation.

The supplier should demonstrate historical reporting, trend analysis, and SLA monitoring

Additionally, the manager receives approval requests related to service requests, access requests, or workflow approvals. The supplier should demonstrate how approvals can be completed directly through email or secure links without requiring a full login to the platform.

The demonstration should also show how approvals remain fully auditable and linked to the underlying ticket or request, including notifications, reminders, escalations, and SLA impact when approvals are delayed.

6.2 Demo topics and tasks

Topic	Please demonstrate
Manager Dashboard & Workload Overview	Show manager dashboard Display team and individual workload Show backlog, SLA indicators, and performance metrics Demonstrate workload and capacity insights
Data-Driven Insights	Show historical trends and reporting Demonstrate forecasting or insights
Resource Management	Show workload analysis per team or agent
SLA Monitoring	Show SLA status across tickets and services Highlight SLA risks or breaches Demonstrate SLA impact on prioritization
Approval Without Login	Trigger an approval request Show approval via email or secure link Demonstrate approval without logging into the platform
Approval Context & Audit	Show approval details and context Demonstrate audit trail of approvals Show how approvals are linked to tickets or requests
Notifications & Escalation	Show notifications for pending approvals Demonstrate reminders or escalations for delayed approvals
Dashboard & Reporting Configuration	Use dashboard metrics and filters Show reporting flexibility and drill-down capabilities
AI & Forecasting	Demonstrate forecasting or workload prediction Show AI-supported insights or recommendations