City of Mason (OH) Exchange 2010 Deployment and Migration

Professional Services – Statement of Work

Prepared for:

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ENGAGEMENT STRUCTURE

PROJECT DESCRIPTION

The services described herein detail the Professional Services to be performed by AdvizeX Technologies for City of Mason (OH) (Hereafter "Mason" or "Customer".) Based on Mason solution requests, AdvizeX Technologies proposes to perform an Exchange 2010 ("Exchange") Deployment project, including Design and Planning, Deployment, Configuration, Migrations, and Decommissioning. The details of the project, including the scope, topics, and deliverables, are included in this document.

Additionally, at the Mason's request, AdvizeX includes a VMware Health-check in the scope of this engagement. The new email solution is expected to be installed in this VMware environment. Assuring the health of that environment will benefit the Exchange installation for dependability and performance.

AdvizeX thanks the City of Mason for the opportunity to present this services proposal and looks forward to a successful project.

CURRENT STATE

AdvizeX understands the following about Mason systems:

Email:
- Exchange 2003
- Single datacenter, Single Server
- Current Server is virtualized on VMware vSphere 5.X. (this is the target cluster also.)
- In-scope objects: 200-300
- Message hygiene is provided by MXLogic (McAfee)
- No encryption is in use.

Clients:
- Windows 7 and Office 2010
- Mobile devices: mainly iPhones
-

Active Directory:
- 2008 R2
- Single domain, single forest
- Three (3) Domain Controllers

Supporting Infrastructure:
- VMware vSphere 5.X
    - Two (2) hosts (Dell R710's)
    - Single vCenter Server (physical, separate from hosts)
- Storage
    - Silicon Mechanics (Note: No capacity information was gathered. It will be during Planning and Design.)

- Networking
  - Netgear Prosafe (Unmanaged, 10GB core switch)
  - Others are Cisco 3560's and 3570's
- Date Protection
  - AppAssure (Dell)

PROPOSED PROJECT APPROACH AND ASSUMED DESIGN

This Statement of Work and the associated level of effort is based on a single-server, Exchange 2010 design and installation. Should the design change during the Planning and Design phase of this project, a Project Change Request (PCR) would be issued for the change and additional project hours/budget.

PROJECT PHASES AND TASKS

AdvizeX will perform this project with the following tasks:

- Assessment and Familiarization – AdvizeX will assess the current Active Directory, Exchange, and supporting Networking services for anything that would hinder the upgrade process. This will not be an exhaustive inventory of the entire environment. As such, AdvizeX will be dependent on the City of Mason for information such as system dependencies on the current installation. The result of this phase will be the **Current State Assessment Report**.

  Additionally, during this phase, AdvizeX will perform a brief review of the current VMware Cluster configuration and resource capacities. The report from this phase will list recommended remediation tasks for the current VMware environment to support the new Exchange installation.

- Planning – AdvizeX will consult with Mason on the configuration of the new Exchange installation, along with the upgrade, migration, and decommissioning processes.

  During the Planning Phase, the AdvizeX SME will perform a round-table discussion to determine the business and technical requirements for the target Exchange solution. Topics of the discussion, and resulting design, will be:
  - Server Roles
  - Exchange Server and Client-Access License Editions and Quantities
  - Designing Exchange for Virtualization
  - Server Placement
  - Server and Database Sizing, including Storage Data Layout for Capacity and Performance
  - Security features and design
  - Administrative Model
  - Internal and External Client Access
  - Mobile Device Access
  - Message Archiving
  - Message Filtering
  - Data Protection (Backup/Restore)

    o Coexistence and Migration

Findings of this phase will be documented in the **Deployment and Migration Planning Report**.

- Performance Validation and Testing – Prior to the installation of Exchange on any of the new systems (servers or storage), AdvizeX will use Microsoft tools such as LoadGen and JetStress to validate that the infrastructure will provide the required Input/Output per Second (IOPS), according to the results of the design and planning session as calculated with the Microsoft Mailbox Server Sizing Calculator. AdvizeX will provide a **Performance Validation Report**.
- Deployment – AdvizeX will perform tasks to install and configure the new Exchange servers into the existing Active Directory domain.

  - AdvizeX will install and configure Exchange 2010 according to the approved Exchange design document.
    - AdvizeX will install one (1) Exchange 2010 server.
    - The servers are assumed to be virtual servers, hosted on an existing VMware cluster. (VMware installation and configuration tasks are separate from this proposal, but are dependencies.)
    - One (1) Exchange Server will be configured to host the three required Exchange 2010 roles, Client Access, Hub Transport, and Mailbox Server. Additionally, the Unified Messaging role will be installed and configure, if it is determined to be required during Design.
  - Certificates for SSL and HTTPS traffic will be configured. Where necessary, City of Mason may need to procure new certificates. AdvizeX will assist with that process.
  - AdvizeX will test client connectivity to the newly deployed Exchange installation. This will include Outlook, Outlook Anywhere, Outlook Web Access, and mobile client devices connecting via ActiveSync.
  - AdvizeX will facilitate the cutover of mail traffic and client connectivity to the newly deployed Exchange installation. This will include SMTP and/or MX routing, and redirecting client connections. AdvizeX may have an indirect role in changing these settings, as is the case for DNS/Firewall changes.
- Testing – AdvizeX will test functionality of the newly deployed Exchange installation.
- Migration –
  - Mailboxes: AdvizeX will perform the migration of mailboxes from the current solution to the newly deployed Exchange server. AdvizeX assumes that the migration process will include moving mailboxes to the target database(s) using native Exchange toolsets. AdvizeX recommends migration to occur after hours or over a weekend.

    AdvizeX will first establish coexistence between the two Exchange servers. AdvizeX will then perform end-user mailbox migrations to the target Exchange 2010 server in three phases, Test, Pilot, and Production.

The "Test" group is usually from the IT department and typically involved in the project. These are tech savvy individuals who can work thru minor issues in the first phase of migrations. The Test group will be limited to 10 users.

The "Pilot" group will be from other departments and will not necessarily be technical individuals. The Pilot group will be limited to 20 users.

The remainder of the migration will be "Production" moves. AdvizeX understands there are "200-300" mailboxes to be migrated.

Tasks for this Phase:
- Perform Test Migrations and validate proper data migration from Exchange 2003
- Perform Pilot User migrations and validate proper data migration
- Perform Production User migrations

The deliverables will include:
- User Mailboxes Migrated to Exchange 2010.

  o Public Folders: AdvizeX assumes the use of Public Folders to be for scheduling of conference rooms. AdvizeX will migrate public folders as is unless otherwise stated in the Design and Planning phase. This is specifically for the transition of shared public folders to Resource Mailboxes in Exchange 2010. Should this not be correct, the SoW can be modified, or a PCR issued. Additionally, AdvizeX can train Mason personnel on this transition process during Transfer of Knowledge.
- Decommissioning: Once all dependencies have been removed from the current Exchange 2003 server, AdvizeX will perform the decommissioning of that server and associated Active Directory and/or Exchange settings and/or objects. (This task may occur after a pause in the project after Mason personnel completes Mailbox migrations.)

Additionally, throughout the project, AdvizeX provides the following services:

- Project Management: for project status reporting, logistics, and communications.
- Transfer of Knowledge: assumed to be day-to-day Operational training on the systems deployed during this project. (Not to be considered training for certification or exam preparation.)
- During-project support: assumed to be support for any issues directly caused by the upgrade of the systems included in the scope of this project.

DELIVERABLES

The deliverables of this project, besides the deployed systems, will be:

- **Current State Assessment Report**, as described in the Assessment phase above.
- **Deployment and Migration Planning Report**, as described in the Planning and Design phase above.
- **Performance Validation Report,** with the output reports of Jetstress.
- Deployed Exchange environment.
- Migration of mailboxes.
- **"As Built"** Documentation on the new Exchange server.

ESTIMATED PROJECT DURATION

- AdvizeX anticipates that this Exchange Upgrade project will take eight (8) to nine (9) business days to complete.

ASSUMPTIONS

The following elements are assumed from the services proposed in this Statement of Work as they may affect the expected level of effort and subsequently, the project pricing:

- AdvizeX is not responsible for the removal of any other dependencies on the current Exchange server prior to decommissioning.
- Mason networking will be configured to support the Exchange installation. This will be discussed during planning and design, with the expected configuration included in the Design Report.
- Should the assumed design change during planning and design, and the modified design result in a significant scope change, addition project time may be required for Deployment. As this is a Time and Materials project, a PCR will not be required for additional hours, but may be provided to document the change.
- For any newly deployed systems, AdvizeX has estimated the level of effort assuming that Mason will perform Server Provisioning tasks, including the installation of any Service Packs, Updates, agents or other software to meet Mason' server build policy.
- AdvizeX assumes that Mason is responsible for non-Exchange systems to support this Exchange deployment project, this includes (but not limited to) Data Protection, Message Hygiene, and any Cisco Unified Communications (ex. Call Manager) services.
- All tasks where virtual machines will be used to host services assume a fully functional virtualization platform installation.

EXCLUSIONS

The following elements are excluded from the services proposed in this Statement of Work:
Anything not explicitly stated in this document as "in scope", along with:

- Deployment and/or performance of any of the remediation tasks recommended in this Statement of Work. AdvizeX can provide a separate SoW or PCR to perform those tasks.
- Development of custom solutions, including scripting, without limitation, including any modification of Customer's application software.
- Any additional hardware/software or configuration thereof not listed in this document.
- Financial impacts or analysis.
- Development or architectural design beyond what is required to perform the work detailed in the Project Details for this project.
- Construction or delivery of any education curriculum
- Delivery of financial assessments or corresponding impact analysis

If any of the above elements must later be brought into the scope of this project, the Change Management Process will be invoked to address the required changes.

GOVERNANCE

TERMS AND CONDITIONS

AdvizeX and Mason acknowledge and agree to the following terms and conditions:

- If a Master Services Agreement already exists between Mason and AdvizeX, the terms of the MSA supersede and enhance the terms below.
- This proposal contains proprietary information of Mason and AdvizeX and may not be reproduced or shared without the advance written consent of both parties.
- This proposal has been prepared based on information supplied by Mason and on our observations, and contains our entire proposal. No representations, undertakings, agreements, terms, or conditions exist other than those contained in this proposal.
- Any errors or omissions in this document should be deemed mechanical and will be corrected upon discovery.
- This proposal and associated price quotation are valid for a period of 30 days from the date on listed on this document's cover page.
- Resources utilized in the delivery of this engagement are restricted to standard business hours (8am-5pm EST, 40 hours per week) unless agreed to in advance by both parties.
- AdvizeX personnel are entitled to time off in compliance with AdvizeX company policies. All such leave will be communicated to Mason in advance whenever possible and will be coordinated to minimize any potential impact on this engagement.
- A signed Statement of Work and validated method of payment are required prior to project commencement.
- AdvizeX requires a minimum of ten business days from the signature of this Statement of Work to staff the project.

RESPONSIBILITIES

AdvizeX and Mason agree to the following definition of responsibilities:

- AdvizeX will provide a project manager to act as the single point-of-contact for coordination of any activities required to successfully complete this engagement.
- Mason will provide all software and/or licenses required to realize the designed solution.
- Mason is responsible for all data protection and hygiene solutions. AdvizeX strongly recommends against running production systems without data protection, but will proceed with the project with Mason's permission, if these services are not in place. Mason assumes the risk for data loss and/or infection.
- Mason will provide a single point-of-contact to facilitate this engagement that is responsible for providing timely feedback to requests made during the project.
- Mason acknowledges that timely provision of and access to staff, facilities, data, documentation, and infrastructure is required to complete this engagement within the specified timeframe.
- Mason is responsible for the accuracy and completeness of data provided to AdvizeX to deliver this engagement. AdvizeX may review or validate said information, but is not responsible for gathering it unless defined in the Project Scope.
- Mason is responsible for the coordination of any outages required to complete the services detailed in this Statement of Work, including change management approval.
- Mason is responsible for the full and complete backups of their data, and AdvizeX shall not be held liable for any data loss that may occur.
- Travel-related expenses will be billed to Mason at actual cost if so referenced in the Investment section of this document, and include (but are not limited to):
  - Transit Fares (Airline, Taxi, Train)
  - Hotel Reservations and Fees (Internet Access)
  - Car Rentals and Associated Costs (Gasoline, Parking, Tolls)
  - Daily Food Allowances

COMPLETION CRITERIA

Unless specifically stated otherwise, acceptance of the services and any materials provided hereunder will occur upon the completion of the applicable portion of the services. AdvizeX uses a standard Milestone Completion Form (MCF) as the basis for all services revenue recognition. When AdvizeX has fulfilled the criteria associated with a milestone or timeframe as defined in the Investment of this document, AdvizeX shall send Mason a MCF indicating project phase completion and requesting acceptance and signoff.

If Mason is satisfied with the performance for that phase, signoff will indicate acceptance. If Mason responds in writing that AdvizeX has not satisfactorily completed the phase, the parties will meet and use good faith to resolve difficulties.

The receipt of Mason signoff, or the lack of written notice to AdvizeX of any issues with work performed within five business days of receipt of a MCF, will be deemed as acceptance of the services performed. AdvizeX will recognize revenue upon delivery of a signed MCF or five business days after customer has received the MCF.

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CHANGE MANAGEMENT PROCESS

AdvizeX and Mason agree to use industry standard change management processes to provide documentation and control for any changes to this Statement of Work.

INVESTMENT

The total **fixed-fee** investment for the services defined in this Statement of Work is **$15,900.00**. This project is assumed to be delivered by AdvizeX personnel local to Mason, OH. As such, no Travel Expenses are anticipated. Should Mason have project scheduling demands that require non-local personnel, options for delivery will be presented to Mason for approval.

AdvizeX shall recognize project completion based on the schedule defined below. The fees for this project are based upon the scope of work and efforts detailed in this document. AdvizeX will bill Mason based on the investment schedule defined below.

Investment Schedule:

#	Milestone/Event:	Amount:
1	Delivery of Assessment and Design Reports	$3,000.00
2	Completion of Deployment and Configuration. Delivery of Testing Reports	$3,000.00
3	Migration of Test, Pilot, and Production Mailboxes	$5,000.00
4	Project Completion and Delivery of "As Built" Documentation	$4,900.00
	Total:	$15,900.00

Mason understands and agrees that the services proposed in this Statement of Work are provided on a fixed price basis for the scope of work outlined in this document.

The fees for this project are based upon the scope of work and efforts detailed in this document.

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STATEMENT OF WORK ACCEPTANCE

All parties hereby acknowledge that they have read and understand this Statement of Work and **all** attachments thereof, and agree to all terms and conditions stated herein.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date below:

AdvizeX Technologies LLC	**City of Mason (OH)**
(signature)	*Robin McKeehan*
SIGNATURE	SIGNATURE
Doug Zigmont	*Robin McKeehan*
PRINTED NAME	PRINTED NAME
Consulting Manager	*IT Manager*
TITLE	TITLE
4/7/2014	*4/22/2014*
DATE	DATE
	ORDINANCE # 2014-23

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2/25/2014	1.0	Initial Draft	Doug Zigmont	Mason
4/7/2014	1.2	Mason requested revisions	Doug Zigmont	

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Terms & Conditions	F.O.B.
Acceptance of this quotation includes acceptance of all Terms & Conditions as specified in this quotation.	Point of Origin

ITEM	DESCRIPTION	QTY	UNIT PRICE	EXTENDED
312-04275	MICROSOFT : Exchange Server Windows Standard 2013 Non-Specific License Only NO MEDIA INCLUDED(Open),Full New License(English), (Open Government)	1	$474.60	$474.60
381-04343	MICROSOFT : Exchange Server Windows Standard User CAL 2013 Non-Specific 1 Client(s) License Only NO MEDIA INCLUDED(Open),Full New License(English), (Open Government)	260	$52.14	$13,556.40
PGI-00580	MICROSOFT : Exchange Server Windows Enterprise User CAL 2013 Non-Specific 1 Client(s) License Only NO MEDIA INCLUDED(Open),Full New License(English), (Open Government) *Voice Mail*	260	$32.03	$8,327.80
SERVICES	AdvizeX Services	1	$15,900.00	$15,900.00
	Subtotal			$38,258.80
	Tax			$0
	Estimated Freight			$0
	TOTAL:			**$38,258.80**

Notes:

ORDINANCE # 2014-23

Unless reflected above the quotation total does not include applicable sales tax and shipping charges.

Payment terms are Net 30 unless otherwise agreed to in writing. We do not accept credit cards.

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TO:

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Email: mlakas@advizex.com

Terms & Conditions	F.O.B.
Acceptance of this quotation includes acceptance of all Terms & Conditions as specified in this quotation.	Point of Origin

ITEM	DESCRIPTION	QTY	UNIT PRICE	EXTENDED