SAMPLE STATEMENT OF WORK
APPENDIX D
DIR-TSO-3776

Statement of Work	Client Company Name Active Directory Redesign Phase IV March 8, 2017 V1.0

Texas DIR Contract: DIR-TSO-3776

(SUBJECT TO THE TERMS AND CONDITIONS OF DIR CONTRACT DIR-TSO-3776)

Customer PO #: <place customer PO # here>

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Prepared by Eagle TG, LLC on March 8, 2017

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1. Introduction

1.1 STATEMENT OF PUROPOSE

Eagle TG, LLC is pleased to submit this Statement of Work for Client Company Name's (Client) Active Directory Redesign Phase IV project.

1.2 COMPANY PROFILE

Eagle TG is a Microsoft Gold Partner with several competencies, to include the Gold Datacenter competency. We are also a WSO2 Preferred Partner. We are headquartered in New Braunfels, Texas and have offices in the St Louis, Missouri area. Our company focuses on delivering Information Technology and Consulting services to both the federal government and commercial clients. We pride ourselves in assisting our clients in developing, deploying, and maintaining secure, reliable, sustainable and cost effective solutions.

Our focus areas include, but are not limited to, Microsoft Active Directory (AD), Microsoft Exchange, Microsoft SharePoint Assessments, Designs, and Migrations, Project/Program Management, Systems Engineering and Design, Application Development, Enterprise Architecture using the DOD Architect Framework, and Private/Public Cloud solutions.

Our team understands complex AD consolidations better than most. Many of our team members were directly involved with the US Air Force Active Directory consolidation efforts. That project created the largest single AD forest supporting 800,000 users and worked to consolidate 14+ existing AD forests into one. Our team members supported all phases including the AD design, migrations, project management, and support.

1.3 CONFIDENTIAL INFORMATION

Eagle TG understands the AD Redesign Phase IV project's RFP and any information provided by CLIENT in connection with it is to be treated as CLIENT confidential and proprietary information and are subject to the restrictions stated in the Non-Disclosure Agreement. Eagle TG also understands all information provided by CLIENT to Eagle TG in connection with this RFP shall be treated confidentially and used by EagleTG for the sole purpose of preparing this proposal. Furthermore, Eagle TG shall restrict the distribution of this RFP, including any related CLIENT communications, only to Eagle TG employees who have a need to use it for preparing this proposal.

1.4 RFP SCOPE

This Statement of Work is for the remaining work streams to migrate all systems which currently reside in a single AD forest named CLIENTRRR with multiple legacy AD source domains named CLIENT, CLIENTMMM, and DDDD, to the newly design targeted AD forests/domains named CLIENTPPPP and CLIENTTTT.

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Eagle TG also understands the tasks of migrating servers from the legacy AD source domains to the targeted AD forest/domain, the tables in Section 8 (Scope Definitions and Details) of the RFP contain various summary details about the scope of servers destined for migration to the target Active Directory domain.

1.5 PROJECT GOAL

Eagle TG understands the goal of this project is to have all the systems migrated from the source domain to the target domain continue to function exactly the same as they do today in the legacy AD forest. Eagle TG believes the familiarity into the CLIENT environment we obtained during the Microsoft Exchange project will help us and the CLIENT team achieve this goal.

Eagle TG understands CLIENT broadly defines a system as the server, its hosted applications, third party software products, and all service accounts. In some cases, there may be additional configuration items that must be changed in which CLIENT is not fully aware of at the time of the RFP for this project.

Eagle TG also understands the legacy system and current state of CLIENT' AD environment consists of a single forest with five domains as shown below in Figure 1 below.

1.6 REQUIREMENTS

Eagle TG understands the overall requirement is to migrate all systems listed in the RFP from the current forests to the target state (future) forests.

2. Project Description

2.1 PRODUCT DESCRIPTION SUMMARY

Eagle TG's standard project methodology utilizes a four-phase approach; the level of effort in each phase is determined by realistically evaluating the complexity of the Project and the Client's environment. We believe our approach is well proven, and utilize this methodology on every engagement, including the recent CLIENT Exchange Migration project. The phases are depicted in the process diagram below.

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Figure 1 – Eagle TG's Project Methodology by Phase
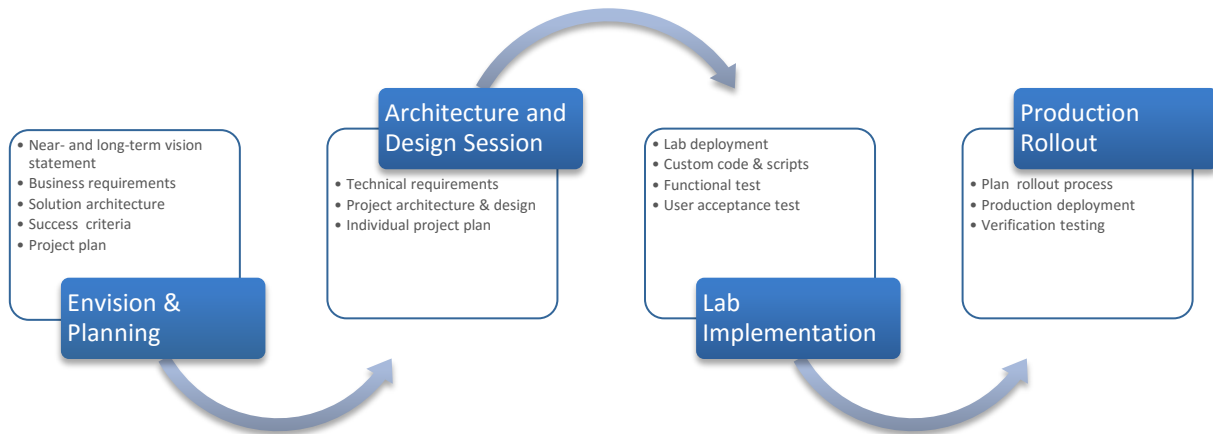
Eagle TG will work closely with CLIENT Staff to gather additional information about the environment to be remediated. Eagle TG will utilize prior knowledge of the environment, any additional information gathered during the sessions, and rock-solid procedures to develop a master plan to remediate the required servers, applications, and accounts in accordance with the Project Goal.

Eagle TG will utilize industry standard tools and best practices to remediate the infrastructure per the master plan and schedule.

2.1.1   ENVISIONING AND PLANNING SESSION (EPS)

In large complex, projects the EPS phase is used to develop the near and long term vision, identify the business requirements, and build solution architecture. The Envisioning stage for the project is also used to get agreement on the success criteria for the project and develop an overall project plan. For CLIENT' Phase IV Active Directory Redesign Project, Eagle TG will work in conjunction with the Client's Data Center, Project Management team(s), and Project Sponsor(s) to determine and refine the long term version in the new forests, as well as identify remaining unspecified or currently unknown dependencies between applications, tiers, business requirements, and general availability of infrastructure and resources to posture a more accurate execution schedule as well as unforeseen tasks and responsibilities.

It is the intention of Eagle TG to conduct a thorough EPS at the beginning of the project for the purposes of vetting all design decisions, mapping of the applications to the correct forest, mapping of the applications to the correct tiers, and development of the Project Delivery Schedule. This approach will be considered a 'high-level' approach as it applies to the migration process. Additionally, Eagle TG will conduct multiple EPS reiterations throughout the various Phases depicted in § 2.2 to ensure accurate and relevant information is gathered for planning of application migration tiers/groupings as determined by the size and count of products residing within the various tiers.

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2.1.2   ARCHITECTURE AND DESIGN SESSIONS (ADS)

In the ADS phase, Eagle TG conducts workshops and roundtable discussions that focus on gathering the required information needed to develop a detailed design for CLIENT. For this project, Eagle TG will continue to work with the Client's Data Center and Project Management teams to execute a more detailed responsibility matrix. Eagle TG has an understanding of CLIENT' change control processes as result of the recently performed Exchange 2013 migration. However, Eagle TG's engineers and Engagement Management teams will still review the Company's change control and production support requirements and processes to better understand any changes which may have recently changed. During the ADS phase, Eagle TG will also have an in-depth discussion with CLIENT project team members on project-related tools, methodologies and techniques used to complete the migration.

Similar to the EPS, Eagle TG will conduct an initial ADS at the beginning of the project that will be approached as a holistic design solution for the project entirety based on coordination and engineering with CLIENT' technical team. As mentioned with the EPS, an ADS will be completed for each Phase depicted in § 2.2 in order to design the best practice solution for all applications as they are distributed by tiers/groupings depending.

2.1.3   LAB OR PILOT IMPLEMENTATION

In the lab or pilot implementation and verification-testing phase, Eagle TG deploys the components of the proposed design in either a lab environment or to a controlled environment in production. This effort validates the configuration of the design needed for the full deployment of the solution into the production environment and allows testing of features in a controlled manner. It is during this phase of the project any custom components, if required, are developed. Using this methodology reduces any associated risks; it allows the Eagle TG team the ability to gather any lessons learned and refine any changes required in the migration process prior to migrating any of CLIENT' critical train movement business applications.

Eagle TG will utilize CLIENT' existing test environment where applicable. In cases where there is not an appropriate test environment Eagle TG may test the migration of the application in its own lab environment with the exception of any custom applications that CLIENT may have. Any custom applications will need a test environment built by CLIENT.

2.1.4   PRODUCTION ROLLOUT

The final phase of the process is production rollout. During this phase the lab system design and setup is deployed to the production environment and system functionality verified by application owners. Specific to this project, Eagle TG will migrate systems in accordance to the agreed upon schedule developed during the EPS phase.

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2.1.5 KNOWLEDGE TRANSFER AND OPERATIONAL GUIDANCE

Knowledge transfer is a key component of our delivery methodology. It is Eagle TG's normal manner of delivery to work in a consultative and collaborative manner with Project stakeholders and Subject Matter Experts (SMEs). It is important client staff be available during the various deployment phases to ensure the knowledge transfer is accomplished.

2.2 DELIVERY SCHEDULE*

Table 1 - Project Milestones

Milestone**	Duration
Active Directory Review & Management	
Phase I: Active Directory Design Validation	5 Days
Phase II: Active Directory Policies & Procedures	5 Days
Migration Planning & Design	
Phase III: Initial Envisioning and Planning Sessions & Architecture and Design Sessions	8 Days
Phase IV: Pilot Implementation	5 Days
Production/Execution	
Phase V: Tier 6	1-2 Days
Phase VI: Tier 5	5 Weeks
Phase VII: Tier 2 & 3	1 Week
Phase VIII: Tier 4	1 Week
Phase IX: Tier 1	5 Weeks
Phase X: Tier 0	12 Weeks
Closeout	
Phase XI: Project Review/Closeout	1-2 Days
Total Project Duration	31 Weeks***

*CLIENT and Eagle TG will agree upon a baseline schedule once Phase I and III are completed and a schedule can be determined.

**The current Milestone schedule is based on known information provided in Section 8 of the RFP. It is assumed by Eagle TG that CLIENT' preference would be to migrate systems from non-production tiers first, followed by production tiers non-critical to train movement, and finally tiers with HR recovery points.

***Level of Effort by tiers are based on an average of migration risk assessments by Eagle TG of all provided applications in Section 8 of the RFP divided by 917 systems. Eagle TG understands some applications may spread across multiple tiers and dependencies may not be immediately available for an accurate development of the delivery schedule. As a result, during the

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EPS Phase when further information can be gathered on application assignments by tier through coordinated engineering conversations between both parties, a more granulated distribution of time by Phase/tier can be provided with a sum of 31 weeks in total. Note that this sum does include anticipated Level of Effort by Eagle TG to provide support for Policy and Procedure development by application but the support increments are not included in the Phase durations as a result of unknown distribution of applications by tiers.

2.3 DETAILED PROPOSAL REQUIREMENTS

2.3.1 TECHNICAL SPECIFICATIONS

Eagle TG understands and has experience in the following:

- ➢ **Authentication.** CLIENT uses Active Directory as a primary single sign on (SSO) solution. Eagle TG has extensive knowledge around Active Directory SSO solutions. Additionally, Eagle TG has no concerns with using Active Directory 2012 R2 as the baseline requirement for CLIENT, and LDAP for authentication to AD with products such as Linux and Samba-Winbind.

- ➢ **Hypervisor.** Eagle TG has worked with many versions of VMware, including but not limited to 5.1. and 5.5.

- ➢ **Server Hardware.** Eagle TG has worked with HP DL380 or 580 rack mount Intel servers before and does not express concern.

- ➢ **Operating System Standards.** Eagle TG has considerable Microsoft Windows Server experience with all versions including 2012 R2. Additionally, Eagle TG has worked on projects including Red Hat Linux 6.x servers.

- ➢ **User Access.** Eagle TG does not see any concern with all users accessing applications over the network via direct AD authentication or applications hosted within Citrix XenApp version 6.5.

- ➢ **Third Party Software.** Eagle TG has worked with all the below third party products:

    a. Symantec Endpoint Protection
    b. EMC PowerPath
    c. Microsoft System Center Operations Manager (SCOM)
    d. Commvault Sympana 10
    e. BMC Control-M
    f. Bit9

    However, we have limited experience with EMC PowerPath, EMC SourceOne, CommVault Sympana 10, BMC Control-M, and Bit9 and may require vendor or SME support from CLIENT.

Eagle TG groups the items to be remediated into three categories:

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- **Application Migration** – This classification represents items where new servers must be stood up and the applications data migrated to the new environment.

- **Server Migration** – This classification represents items where the servers only need to be joined to the new domain. This classification also represents applications that only need configuration changes to be remediated.

- **Mixed Migration** – This classification will represent items where a combination of both Application and Server migration methods must be utilized.

Any applications tied heavily into Active Directory are classified as an Application Migration. Eagle TG has already identified the following applications as an Application Migration:

- **Exchange** – Microsoft Exchange Server is tightly integrated into Active Directory and in order to move Exchange to a new Active Directory Forest an Exchange Migration is required. Eagle TG will stand up a new Exchange Environment that mirrors the prior deployed environment. There will be some slight differences in the new environment to accommodate coexistence between the two to support the migration of mailboxes. However, we will remove all coexistence settings during the decommissioning process of the old environment to mirror the current state as stated in the RFP.

- **Lync** – Microsoft Lync Server is tightly integrated into Active Directory and in order to move Lync to a new Active Directory Forest a new Lync environment must be stood up. There is not an officially supported migration method for Lync to a new Active Directory forest and there is no coexistence. EagleTG will build a new Lync environment in the new Active Directory Forest to mirror the existing deployment. All users will need to be cutover to the new Lync environment at one time due to the lack of coexistence.

- **System Center** – Due to the nature of Microsoft System Center products, it is recommended a new infrastructure be stood up to support System Center in the new environment. Eagle TG will export configuration objects and settings from the existing environment and import them into the new environment.

Eagle TG has already identified the following applications as a Server Migration:

- **SAP** - For SAP ECC migration the main requirements are that the server be joined to the new domain, and then service accounts be changed to accounts in the new forest. Some permissions may need to be updated.

- **File Servers** – Eagle TG will use ADMT to migrate any file servers. ADMT will recreate any ACL's to use new SID's from new domain.

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- **SQL Servers** - For SQL server migration the main requirements are the server be joined to the new domain, and then service accounts be changed to accounts in the new forest.

- **SharePoint** - For SharePoint server migration the main requirements are the server be joined to the new domain, and then service accounts and application pools be changed to accounts in the new forest. SharePoint will also require remapping of user accounts within SharePoint.

Remaining applications and servers will require additional planning with CLIENT application owners and SMEs to classify, but it is assumed the majority of the applications and server will fall into the Server Migration classification.

Eagle TG also recommends any application running on Server 2003 or older be classified as an Application Migration using new build standards.

Eagle TG intends to start with non-production applications and servers (Tiers 5, 6), then productive servers (Tiers 2, 3), before proceeding to the more critical services (Tiers 0, 1, and 4).

2.3.2 PROJECT TASKS

Table 2 - Project Tasks

Task Name	Summary Description
Review new Active Directory Forest Configurations	o Forest/Domain level trusts. o Verify AD Forest and Domain functional levels. o Verify creation and login information for administrative accounts in each forest to be used for migration processes. o Verify AD user accounts and groups migrated from source forest.

Exchange Migration Tasks:

Task Name	Summary Description
Mailbox Database and Logs Storage	Review storage requirements for each Exchange 2013 server and finalize allocation for mailbox database and log files.
Exchange 2013 Installation Account	Work with CLIENT IT Staff to identify Exchange 2013 Install account with the following rights: o Cross Forest administrative rights o Schema Admins in target forests o Enterprise Admins in target forests o Domain Admins in target forests o Log on Locally or local admin rights (to the servers Exchange will be installed) o Exchange Organization Management in source forests o Remediation for any issues discovered
Verify Base OS Conforms to	Review the Windows servers that Exchange 2013 will be installed on.

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Standards	o Verify server operating system version is Windows Server 2012 R2 o Verify Windows server patch level and that all applicable updates have been applied via windows update service
Install Prerequisites for Exchange server 2013	o Microsoft .Net framework 4.5 o Windows Management Framework 3.0 o Remote administrations tool pack o Microsoft Unified Communications Managed API 4.0, Core Runtime 64-bit o Microsoft Office 2010 Filter Pack 64 bit
Prepare Active Directory and Schema	Update the new Forest/Domains for Exchange 2013: o Forest o Active Directory o Schema
Verify and confirm Exchange 2013 Installation Information	Work with CLIENT IT Staff to identify server names and IP addresses that will be assigned to each Exchange 2013 server.
Exchange 2013 *Mailbox Server Role* Installation	Install Exchange 2013 Enterprise edition on the mailbox servers.
Exchange 2013 *Client Access Server* Role Installations	Install Exchange 2013 Standard edition on the CAS servers.
Mail flow connectors	o Configure new Internet email Send Connectors o Configure new Internet Receive Connectors o Configure new email Relay Connectors o Configure Cross Forest Exchange to Exchange Connectors(Send and Receive)
Create New Mailbox Databases and Associated Transaction Logs	o Create the new mailbox databases on the appropriate mailbox DAG server. Keep in mind the drive location of the mailbox databases and the transaction logs. o Delete the default mailbox database created with the Exchange 2013 installation.
Create Exchange 2013 DAG	o Create Exchange 2013 DAG o Configure Active and Passive copies appropriately
Additional Exchange Cross Forest migration tasks	o Certificate configuration (export from source forest to target forest) o Configure cross forest Autodiscover functionality

Create Exchange 2013 Test Mailboxes	o Work with IT Staff to create Exchange 2013 test mailboxes on each of the Exchange 2013 servers.
	   • Test Internal Outlook Anywhere (OA)
	   • Test Outlook Web Access (OWA)
	   • Test Auto-Discover
	   • Test message delivery (internal & external)
	o Test full mailbox functions

SSL SAN Certificate	o Obtain a new Exchange 2013 SSL SAN certificate and private key assigned to the CAS/HT server roles. o Import the SSL SAN certificate to the Exchange 2013 Servers.
Exchange Send/Receive Connectors	o Verify configuration and test all default Exchange 2013 Send/Receive connectors o Identify all 3rd party systems that need to relay off Exchange 2013 Relay connectors.

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Configure Service Connection Point (SCP)	o Configure SCP for Exchange 2013 for use with Autodiscover. o Update SCP on every Exchange server in the organization.
Domain Name Service (DNS)	o Configure internal and external DNS entries for Exchange 2013 services for each location.
Match up user accounts	o Run built-in exchange script to copy necessary exchange attributes and create mail enabled users with target addresses set in target Exchange 2013 environment.
Change Mail Flow	o Update mail flow from firewall to Exchange 2013 to route to Exchange 2013. o Modify Exchange send, receive, and relay connectors as needed.
Firewall	o Verify successful SMTP traffic delivery on Port 25. o Verify successful Outlook Anywhere connectivity on 443. o Verify successful Outlook Web Access connectivity on 443. o Verify successful Autodiscover connectivity on 443.
Cisco IronPort	o Provide guidance on changing mail delivery from the Source Exchange 2013 servers to the target Exchange 2013 servers.
Reverse Proxy	o Assist IT Staff with installing appropriate SSL SAN certificate on Hardware Load Balancer for applicable services for Exchange 2013 (OWA, OA, ActiveSync, Auto-Discover) Web Listener rules.
SourceOne	o Shortcutted data in SourceOne must be played back into the mailboxes prior to the mailbox being migrated o New SourceOne environment must be setup in the target environment o Shortcutting process will be ran on target environment post migration
Migrate Pilot Users	o Work with IT Staff to identify and migrate Pilot users and test full mail flow and Exchange 2013 services. No more than 25 mailboxes.
Mobile Device Management	o Configure and test Good Server mobile email delivery and management to Exchange 2013 mailbox pilot users. o Configure and test Blackberry Server mobile email delivery to Exchange 2013 mailbox pilot users o Configure and test ActiveSync email delivery to Exchange 2013 mailbox pilot user
Anti-Virus	o Provide IT Staff list of excluded directories, files, and folders on Exchange Servers if using Anti-virus on the Exchange servers.
Email Archiving	o Provide guidance and assistance with testing email archiving solution implemented by CLIENT IT Staff using EMC SourceOne.
Exchange Backup	o Once pilot mailboxes are migrated to Exchange 2013, verify with IT Staff that successful backups are completed and assist as needed.
Faxing	o Verify and test faxing to and from Exchange 2013 with IT Staff and assist as required.
Disaster Recovery / Business Continuity	o Install and configure Exchange 2013 at the Winchester DR location. These servers will hold passive copies of the databases. o Configure Dynamic Quorum and File Witness Share at the third location on Windows Server 2012 R2 server. o Configure the DR location for failover, and test failover of DAGs. Testing of DNS records and routing failover will be completed in conjunction with CLIENT Staff.

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Production Mailbox Migrations to Target Exchange 2013	o Work with IT Staff to migrate mailboxes from source Exchange 2013 to target Exchange 2013.
Decommission source Exchange 2013	o Verify all mailboxes have been migrated to Exchange 2013 or deleted o Verify internet email flow has been configured to route to Exchange 2013 o Verify that all 3rd party systems that relay off of Exchange have been migrated to target Exchange 2013 o Uninstall Exchange from each source Exchange 2013 server o Cleanup and remove any internal/external DNS records for legacy Exchange servers o Cleanup and remove reverse proxy rules for Source Exchange 2013

Lync Migration Tasks:

Task Name	Summary Description
Review Storage requirements	Review storage requirements for each Lync 2013 server and finalize allocation for database and installation files.
Lync 2013 Installation Account	Work with CLIENT Railway Company IT Staff to identify Lync 2013 Install account with the following rights: o Cross Forest administrative rights o Schema Admins in target forests o Enterprise Admins in target forests o Domain Admins in target forests o Log on Locally or local admin rights (to the servers Lync will be installed) o RTC Universal Admins in source forests o Remediation for any issues discovered
Verify Base OS Conforms to Standards	Review the Windows servers that Lync 2013 will be installed on. o Verify server operating system version is Windows Server 2012 R2 o Verify Windows server patch level and that all applicable updates have been applied via windows update service
Install Prerequisites for Lync server 2013	All Lync Servers o Microsoft .Net framework 4.5 o Windows Identity Foundation Front End Servers o Windows Media Format Runtime Back End Servers o Microsoft SQL Server 2012 R2 or SQL Server 2014
Prepare Active Directory and Schema	Update the new Forest/Domains for Lync 2013: o Forest o Active Directory o Schema
Firewall	CLIENT to mirror firewall settings for new Lync environment.
Install Lync setup	Run Lync setup tool to install Topology builder and the Deployment wizard.

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Build and Deploy Lync topology	Use topology builder to perform the following:
	   ○ Create Lync server topology to include:
	      ○ SIP Domains
	      ○ Simple URL's
	      ○ Front End Pools and members
	      ○ Edge Pools and members
	      ○ Gateways
	      ○ Gateway Association
	      ○ Mediation Pools and members
	      ○ Director Pools and members
	      ○ Monitoring Pools
	      ○ Back End Servers
	      ○ File Share
	   ○ Publish topology to include:
	      ○ File share creation
	      ○ Creation of databases on backend and monitoring servers

Run the deployment wizard on pool members	Run the following tasks on the Lync server pool members:
	   ○ Install local configuration store
	   ○ Setup or Remove Lync components
	   ○ Request, install, or Assign Certificates
	      ○ Use this utility to generate CSR for Certificates
	      ○ Use this utility to complete Certificate requests
	      ○ Use this utility to assign Certificates to proper services
	   ○ Start Services

Export information from Source Lync 2013 environment	Use various utilities to export the following:
	   ○ Common area phones
	   ○ User Data
	      ○ Contact lists
	      ○ Conference Directory
	   ○ Voice Settings
	      ○ Dial Plans
	      ○ Voice Policies
	      ○ Voice Routes
	      ○ PSTN usage
	      ○ Voice configuration
	      ○ Trunk configuration
	   ○ Response Groups
	   ○ Conferencing settings
	   ○ Call Park
	   ○ Announcements
	   ○ Unassigned numbers

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Import Information to target Lync 2013 environment	Use various utilities to import the following:
	    o Common area phones
	    o User Data
	          o Contact lists
	          o Conference Directory
	    o Voice Settings
	          o Dial Plans
	          o Voice Policies
	          o Voice Routes
	          o PSTN usage
	          o Voice configuration
	          o Trunk configuration
	    o Response Groups
	    o Conferencing settings
	    o Call Park
	    o Announcements
	    o Unassigned numbers

Test connectivity to edge servers	Use PowerShell and the Lync Edge connectivity suite to test that services are responding as expected.
DNS	CLIENT to cutover DNS records for Lync to point to new environment's IP Addresses. EagleTG will provide a list of records to be updated.
DHCP	Update DHCP Options for Lync Phone Edition
Point gateways to new Lync Environment	CLIENT to configure gateways to point to the new Lync Server pools.

Test	Use various utilities to test the following:
	    o Internal IM
	    o External IM
	    o Federated IM
	    o Inbound/outbound calls
	    o Web Conferencing
	    o Response Groups
	    o Common area phones

Decommission source Lync 2013 environment	o Remove servers from topology
	    o Run Deployment wizard
	    o Remove SQL databases and instances

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SharePoint Migration Tasks:

Task Name	Summary Description
Backup	Create backups of all associated databases.
Create service accounts	Create new service accounts in the new AD Forest that mirror the existing service accounts for SharePoint and SQL. After the server membership has been changed the new Service Accounts must be given appropriate permissions.
Change Server membership	Change membership of server for SharePoint and SQL to be new domain.
Assign Service Accounts to services	Assign the new service accounts to the appropriate SharePoint and SQL services.
Update users in SharePoint	Use PowerShell to migrate the user account in the SharePoint configuration from the old domain the new with the ignoresid switch.
Test	Test to verify access to sites with proper permissions are restored.

Citrix Migration Tasks:

Task Name	Summary Description
User Rights	o EagleTG will require access to the local admin credentials for Citrix servers. o The local admin account will be granted full admin permissions to Citrix
Backup	The datastores will need to be fully backed up prior to starting the migration
Disable Logons	During the migration process logons will be disabled via Citrix.
Change domain of Data Store Server	Change domain membership of Data Store server to new Domain.
Set services accounts	Change service accounts to new domain service accounts or network service.
Change Domain of non-Data Store servers	Change domain membership of all other farm servers to new domain.
Test Access	Test to verify access with proper accounts.

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System Center Migration Tasks:

Task Name	Summary Description
Review Storage allocations	Review storage requirements for each System Center server and finalize allocation for database and installation files.
Verify base OS	Review Base OS install to ensure it adheres to standards.
Install Prerequisites	Install necessary prerequisites for the corresponding system center product.
Install System Center	Install the corresponding System Center product.
Export existing management packs and settings	Use various tools to export settings and management packs from the source environment.
Import Settings from source environment	Use various tools to import settings and management packs to the target environment.
Redeploy agents	Redeploy necessary agents for the corresponding System Center product.
Test	Test system center functionality per product.

SQL Server Migration Tasks:

Task Name	Summary Description
Ensure proper access to application	Review Application Access with CLIENT to ensure EagleTG has the necessary access to applications.
Verify SA account	Verify that the built-in SA account is enabled and the password is known.
Create service accounts	Create any necessary service accounts in the new forest.
Break any mirroring	Any database mirror will need to be removed.
Change Domain Membership	Change the server's domain membership to new server.
Change any service accounts	Change the service accounts in us by the application.
Recreate database mirroring	Any databases that were previously mirrored will need to be restored
Change Logins	User logins will change automatically when the account logs into the database based upon the SIDHistory. Group logins will need to be changed.
Test Application	Test application functionality.

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All other Server Migration Tasks:

Task Name	Summary Description
Ensure proper access to application	Review Application Access with CLIENT to ensure Eagle TG has the necessary access to applications.
Check with vendor for any specific instructions	Some vendors provide specific instructions for moving the application to a new forest. Eagle TG will need CLIENT to coordinate initial communications with the application vendor if EagleTG is unable to locate or determine special instructions for the application.
Create service accounts	Create any necessary service accounts in the new forest.
Change Domain Membership	Change the server's domain membership to new server.
Change any service accounts	Change the service accounts in us by the application.
Change Application Configuration	If the application requires any manual configuration to work with new domain (i.e. Change LDAP Server), Eagle TG will need CLIENT to make changes unless EagleTG is granted full admin access to the application.
Test Application	Test application functionality.

2.3.3 AD REDESIGN SUPPORT

2.3.3.1 EAGLETG RESPONSIBILITIES

Eagle TG will ensure resources are available for the duration of the project. Eagle TG will provide the following resources:

- **Solution Architect** – Responsible for the master plan and may assist with remediation as needed.

- **System Engineer(s)** – Responsible for migration of server and accounts per master plan. Eagle TG may provide more than one System Engineer to the project as needed to meet the End of Year Deadline.

- **Part-Time Project Manager** – Eagle TG defines part time as 20 work hours a week with the exception of Federal and company holidays, vacations schedules, travel, sick leave etc. are not included in weekly hours. The Eagle TG Project Manager is responsible for following the project from inception to conclusion while maintaining high customer satisfaction. The Part-Time Project Manager will serve as a point of contact for the CLIENT Project Manager for all contract inquiries including:

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- o Driving compliance with operational aspects of the consulting practice to ensure delivery of contractual commitments.
- o Assisting with Engineer resource planning and addressing resource performance issues.
- o Management of the financial aspects of the contract.
- o Functioning as the escalation point when issues arise with resources/services and managing any dispute or conflict.
- o Facilitation of post implementation reviews and inputs.
- o Execution of Change Management for the Statement of Work as needed as described in § 4.2.
- o Conduct bi-weekly Project Progress Review (PPR) meetings between Eagle TG and CLIENT leadership.

Additional EagleTG responsibilities include:

- Involvement of other EagleTG SMEs as needed for review and quality assurance.
- Engagement oversight and management of Eagle TG consultants.

2.3.3.2 CLIENT RESPONSIBILITIES

CLIENT has agreed to provide the following resources:

- **Project Manager** – Responsible for coordinating resource availability from the CLIENT organization, maintaining PMO requirements, creating PMO documents, facilitating determined Communication Plan requirements, financial matters related to billing hours, functioning as a single point of contact for the Eagle TG Engagement Manager.

- **IT Project Coordinator** – Responsible for coordinating the tactical tasks with CLIENT IT resources working on project deliverables, assisting the Project Manager in facilitating Communication Plans, and functioning as a backup single point of contact for the Eagle TG Engagement Manager.

- **Application Owner** – Responsible for decision making and obtaining CAB/TRB change management approval where necessary. Additionally, Application Owners will be responsible for application testing and acceptance post-migration during the EagleTG handoff process.

- **Subject Matter Expert** – Responsible for answering questions about applications to be remediated. The SME may also be responsible for making application changes in cases where EagleTG is not permitted to have administrative access to the application.

Additional CLIENT responsibilities include:

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- Responding in a timely fashion to questions pertaining to the scope of the Project and requests made by Eagle TG in relation to the Project.

- Ensure all internal preparations and resources are provided so Eagle TG is able to complete identified tasks and milestones.

- Provide requested documentation to the Project team and access to information resources necessary to complete work product.

- Ensure the appropriate Staff attend workshops and meetings.

- Provide SME availability to support after hour initiatives as required by agreed upon schedule.

- Provide work environment, network access, account privileges, badges, parking permits, and other necessary CLIENT-centered requirements as needed.

CLIENT staff will be responsible for the following items where needed:

- DNS Changes
- User account creation
- Altering or creating new or existing AD Groups
- Providing of IP Addresses
- Firewall changes
- Deployment of base OS
- Coordination with 3rd party vendor support

2.3.4 PRICING

Weekly hours are calculated at the rate of eight (8) hours for each business day in the week and prorated for partial weeks. Normal business hours are defined as 8 AM-5 PM, Monday-Friday. Federal and company holidays, vacations schedules, travel, sick leave etc. are not included in weekly hours.

Consulting services projects require Eagle TG pre-schedule and "set aside" consulting resources to be available for the duration of the project. In order to preserve Eagle TG Consultant availability for the project, Eagle TG requires all work to be performed on a contiguous weekly basis unless breaks are scheduled prior to the start of the project.

2.3.4.1 OVERALL PLAN PRICING

Time & Material bid for developing the overall plan, which includes at a minimum:
   a. Estimated travel
   b. Estimated sequencing which encompasses the entire scope of remediation
   c. Developing the appropriate technical process for migrating servers from source AD to the target AD

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    d.   Migration of service accounts

    e.   Estimated overall Level of Effort, roles and responsibilities and project plan with milestones $37,500.00

CLIENT requested a fixed price bid. The table below shows the labor categories, MSRP, hourly rate, and total for each labor category. This information must be provided in monthly reporting to DIR.

Labor Category	# of Hours	MSRP/List Price	Hourly Rate	Total
Senior Systems Engineer	100	$175.00	$150.00	$15,000.00
Systems Engineer	100	$150.00	$125.00	$12,500.00
System Administrator	100	$125.00	$100.00	$10,000.00
			Total Cost	$37,500.00

2.3.4.3 REMAINING REMEDIATION PRICING

All other identified areas (see Section 8 of the RFP) $ <COST NORMALLY ENTERED HERE>

2.3.5 OTHER RELEVANT MATERIAL AND SERVICES REQUIREMENTS

2.3.5.1 AFTER-HOURS SUPPORT [OPTIONAL CLIN 002]

Eagle TG can provide after-hours Tier III support on a Time and Material basis based on the pricing model in Section 2.3.4.3; it is assumed CLIENT will provide after-hours Tier I/II support. Eagle TG will provide CLIENT a single phone number in the event CLIENT requires after-hours assistance that will contact the Eagle TG On-Call support engineer. Support hours will be billed in full, one-hour increments. After-hours is defined by Eagle TG as outside business hours as described in § 2.3.4.

Additional cost for After-Hours Support is $ 150.00 per hour

Eagle TG recommends CLIENT budget at minimum 80 hours of After-Hours Support.

2.3.5.2 ACTIVE DIRECTORY DESIGN VALIDATION [OPTIONAL CLIN 003]

CLIENT has requested Eagle TG to provide a Solutions Architect to provide design validation for their proposed Active Directory design. The Solutions Architect will also provide recommendations surrounding Active Directory, security, and CLIENT specified

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business needs based on industry best practices. Eagle TG will provide the Solutions Architect on a Time and Material basis plus actual travel expenses (if required by CLIENT).

Additional cost for Solutions Architect is $ <u>150.00 per hour</u>

Eagle TG recommends CLIENT budget at minimum 50 hours of engineering support for a Solutions Architect.

2.3.5.3 POLICIES AND PROCEDURES MANAGEMENT [OPTIONAL CLIN 004]

CLIENT has requested Eagle TG to provide assistance in developing standardized policies and procedures for their new Active Directory environment, applications, provisioning, and de-provisioning. Eagle TG envisions the development process would occur in two separate phases; the first phase beginning during Active Directory Design Validation and the second phase as a reoccurring iteration during the migration of applications as discussed in § 2.1.1.

Additional cost for Policies and Procedures Management Support is $ <u>125.00 per hour</u>

Eagle TG recommends CLIENT budget at minimum 192 hours of engineering support for Policies and Procedure Management.

2.3.5.4 KEY ASSUMPTIONS

Eagle TG has the following key assumptions:

- All hardware required for the project will be installed, configured, and operational at the time of project initiation.

- CLIENT will provide Eagle TG with a written copy of their intended Active Directory design.

- New Active Directory Forest will be in a healthy state prior to execution of the initial EPS and ADS. (§ 2.1)

- All infrastructure is in a healthy state prior to execution of the initial EPS and ADS.

- Forest and Domain level trusts will be configured and appropriate administrative accounts configured with rights in each forest for cross forest Exchange migration.

- All the necessary ports are open for Exchange integration with Active Directory and also between Data Centers for replication.

- Remediation may be required by certain aspects of each server, system, environment, application, middleware to achieve this goal. Eagle TG will research

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and provide remediation as part of the firm fixed price.

- No redesign of applications will be performed during the project, but re-architecture may be required by Eagle TG and CLIENT.

- Any new machines will conform to CLIENT standard of Windows Server 2012 R2 or Red Hat Linux 6.x and patched to the latest levels designated by CLIENT IT.

- A Cisco resource will be available after standard business hours to assist with SIP trunking transition during the Lync 2013 migration.

- CLIENT will be responsible for procuring any required certificates.

- CLIENT Help Desk will be responsible for the tracking and closure of tickets related to the Project. Incidents tied specifically to migration activities which are deemed actionable by Eagle TG will be assigned to them using ServiceNow.

- The Data Center IT Project Coordinator will be utilized for providing a weekly report of tickets assigned to Eagle TG that are project related.

- Eagle TG will be responsible for Tier III support during application migrations up to the point of Application Owner acceptance.

- CLIENT will only contact Eagle TG After-Hours Support in a situation that impacts train movement or loss of business.

- CLIENT will provide Eagle TG with impacted user(s) or Application Owner contact information if After-Hours Support is required in order to validate fix action.

- CLIENT Application Owners will conduct testing and verification within two business days following migrations.

- EagleT G will not be responsible for applications after Application Owners have completed testing and verified functionality in the handoff process.

- Work performed for Tiers 5 and 6 can be conducted outside of the TRB/CAB approval.

- SID history was migrated as part of the user account migration prior to the start of Phase IV.

- CLIENT will be responsible for facilitating TRB/CAB approval for Project related requests in a timely manner.

- All applications are compatible with the new Forest infrastructure.

- Eagle TG will perform a mixture of onsite and remote work depending on the activity work stream.

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- Eagle TG will identify remediation steps needed for the migration. CLIENT has applications that are, in some cases, specific to business and industry and when a gap is identified, CLIENT will make available vendor support contacts to assist in the completion of the remediation.

- The information provided in the RFP is the current state as of May 15, 2015. CLIENT may choose, at its discretion, the retirement or re-platforming of systems due to other activities but will make all reasonable efforts to communicate any de-scope with EagleTG during the Project duration.

- CLIENT will make a reasonable attempt to explain its change control process in advance of the design of a master plan.

- CLIENT already has the most recent version of Microsoft ADMT tool on premise, as well as Microsoft SCCM 2012 R2 that can be utilized for the Project.

- A new EMC SourceOne environment will be stood up for the new Exchange 2013 environment by CLIENT. The old EMC SourceOne environment will be retired by CLIENT for legacy data.

- Data that has been shortcut by EMC SourceOne will be played back into the source mailboxes prior to migration by CLIENT.

- CLIENT will provide a CLIENT Project Manager and Project Coordinator, area application owners and SMEs, AD SMEs, and server and SAN administration of infrastructure.

- Eagle TG will conduct 80% of the work stream with a 20% Project Manager validation and coordination with CLIENT Information Technology to successfully complete the migration of the scope.

2.3.5.5 CERTIFICATIONS

Our engineering team leads have experience with VMware products, but also have several relevant certifications including, but not limited to the following:

- Microsoft Certified Solutions Expert – Server Infrastructure
- Microsoft Certified IT Professional: Enterprise Messaging Administrator
- Microsoft Certified IT Professional: Enterprise Virtualization Administrator
- Microsoft Certified Solutions Expert – SharePoint
- Microsoft Certified Solutions Expert – Communications
- Microsoft Certified Solutions Associate – Windows Server 2012
- Microsoft Certified Solutions Expert – Desktop Infrastructure

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3 Contract Specifications

3.1 OUT OF SCOPE

Components not explicitly listed in § 2 are "out-of-scope".

3.2 PERIOD OF PERFORMANCE

The period of performance will commence upon receipt of the signed Ordering Document.

3.3 PROJECT DELIVERABLES

Table 3 - Project Deliverables Summary

Deliverable Name	Summary Description
Master Migration Plan	An overall plan for the migration of all systems in scope including the actual sequencing on applications and systems.
Complete system migration to CLIENTCP and CLIENTTM	Full system migration from CLIENT and CLIENTTM domains based on the tasks detailed in § 3.1.
Documentation	Documentation of remediated applications to include: • IP Addresses • Databases • Service Accounts • Connected Systems • Operating System

Project deliverables shall be submitted to the Client point of contact and other officials that Client requests. The following describes the process for the delivery and acceptance of Project deliverables:

- **Submission of Deliverables**. Eagle TG shall submit any written deliverables in electronic form via email to the Client point of contact. Client shall have five (5) business days to review and either accept or reject the deliverables. In the absence of formal rejection or acceptance, the deliverables shall be deemed accepted after five (5) business days.

- **Assessment of Deliverables**. The Client point of contact shall determine whether the deliverable meets the requirements as defined in this Proposal and whether the deliverable is complete. Additional out-of-scope work on, or changes to, an accepted deliverable that is requested by the Client shall be considered out of the scope of the Project and shall be managed through the Eagle TG change control process § 274.2.

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- **Acceptance / Rejection**. After reviewing the deliverable, the Client shall either accept the deliverable or shall provide a written reason for rejecting. Acceptance or rejection responses shall be returned to the Eagle TG Consultant or Project Manager via email.

- **Correction of Deliverables**. Eagle TG shall submit a schedule for making changes to the deliverable within five (5) business days of receiving a rejected deliverables acceptance notification. Eagle TG shall correct in-scope problems found with the deliverable and shall resubmit the deliverable to the client point of contact via email.

- **Monitoring and Reporting**. The Eagle TG project team shall track deliverable acceptance. Updates on deliverable acceptance shall be reported in EagleTG status report(s) and discussed during Eagle TG status meetings.

- **Project Completion**. The Project shall be considered complete when all of the deliverables identified have been completed, delivered, and accepted or deemed accepted. This includes any deliverables found in approved change orders for this Project.

4   Contract Terms and Conditions

4.1   TERMS AND CONDITIONS

- This SOW is valid for 60 days from the date of this document.

- The estimates provided in this SOW shall not be exceeded without Client Company Name's authorization.

- Estimates provided in this SOW are based on Eagle TG's current understanding of Client Company Name's requirements.

- Eagle TG reserves the right to separately price any activities not defined in this SOW.

- This SOW is priced based on the assumptions and tasks identified herein.

- Client Company Name agrees that upon project commencement consultant work shall be performed on a contiguous weekly basis without breaks unless scheduled by prior agreement with Eagle TG. Eagle TG reserves the right to reallocate internal engineering resources in situations of project delays that exceed two weeks. Rescheduling resources will be tentative based on availability of resources.

4.2   CHANGE MANAGEMENT

The following process shall be used for changes to this Project scope:

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- A formal change request is initiated when the CLIENT Project Manager determines in conjunction with the Eagle TG Project Manager that additional work is required beyond the original scope of the project.

- The Eagle TG Project Manager prepares a Change Request Form and submits it to the Client point of contact for review, which is by default the CLIENT Project Manager.

- The Client point of contact either approves, rejects, or requests modifications to the Change Request. In some rare cases CLIENT may have more than one point of contact depending on funding level approval authority.

The Client indicates acceptance of the change request by returning a signed copy via email to the Eagle TG Project Manager. The Eagle TG Director of Professional Services returns a countersigned copy to the Client point of contact to indicate agreement of the change by Eagle TG.

4.3 ADDENDUMS

- CLIENT at its discretion, may de-scope areas which are stated when this contract begins. The rationale for altering scope are, for example, but not limited to, the result of application and server retirements, the renegotiation of a software agreement, sudden changes in business climate, competing priorities, projects commissioned which impact this scope after this SOW is signed.

- CLIENT could potentially choose to create another AD forest, for either test or production purposes during this project. If this occurs, CLIENT will communicate this to Eagle TG.

- CLIENT and Eagle TG will agree to a baseline schedule, once Phase I and III are completed and an agreed schedule can be determined.

- CLIENT can at its discretion terminate any part or all of this SOW with Eagle TG on 30 days' notice.

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4.4 INVOICING

Invoices shall be submitted by Eagle TG directly to the Customer and shall be issued in compliance with Chapter 2251, Texas Government Code. All payments for services purchased under the Contract and any provision of acceptance of such services shall be made by the Customer to Eagle TG. For Customers that are not subject to Chapter 2251, Texas Government Code, Customer and Eagle TG will agree to acceptable terms**.**

Invoices must be timely and accurate. Each invoice must match Customer's Purchase Order and include any written changes that may apply, as it relates to services, prices and quantities. Invoices must include the Customer's Purchase Order number or other pertinent information for verification of receipt of the services by the Customer.

Customers shall comply with Chapter 2251, Texas Government Code, in making payments to Eagle TG. The statute states that payments for goods and services are due thirty (30) calendar days after the goods are provided, the services completed, or a correct invoice is received, whichever is later. Payment under the Contract shall not foreclose the right to recover wrongful payments. For Customers that are not subject to Chapter 2251, Texas Government Code, Customer and Eagle TG will agree to acceptable terms.

Table 4 - Invoicing Information

Invoice Address	
Street Address	
City	
State	
Zip	

Project Point of Contact	
Name	
Email Address	
Phone Number	

Send Invoices To	
Name / Department	
Email Address	

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Phone Number	
Can invoices be sent via email?	Yes ☐ No ☐ Emailing invoice is the preferred way. Please do not mail invoices. All invoices must reference the PO number.
Can a link to the invoice be sent?	Yes ☐ No ☐

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5. SOW Acceptance

In order to proceed with the work as defined by this SOW, all parties must sign below acknowledging that they have read the entire document and agree to all terms as laid out within.

Client Company Name   EagleTG, LLC

_____   _____
Authorized Signature   Authorized Signature

_____   _____
(Above Name Printed)   (Above Name Printed)

_____   _____
Title   Title

_____   _____
Date   Date

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