

Statement of Work: SharePoint Migration Services

Supplement 1

Contents

- 1.0 SharePoint Migration Services.....2**
 - 1.1. Background and Overview.....2
- 2.0 Project Requirements, Formal Deliverables and Scope of Work2**
 - 2.1. Deliverable Identification.....2
 - 2.2. Project Requirements and Scope of Work2
 - 2.3. Project Management and Coordination Services3
 - 2.4. Project Planning and Execution Requirements3
- 3.0 Project Considerations3**
 - 3.1. General3
 - 3.2. Knowledge Sharing and Transfer3
 - 3.3. Implementation Guide or Updates to Existing Implementation Guide.....4
- 4.0 Existing ODJFS SharePoint Architecture5**
 - 4.1. Production and DR:5
 - 4.2. User and Acceptance Testing6
 - 4.3. Development.....7
 - 4.4. General Functions and Additional Details7
- 5.0 Technical Environment Statistics8**

1.0 SharePoint Migration Services

1.1. Background and Overview

The Department of Administrative Services (DAS), Office of Information Technology (OIT) maintains an Enterprise service for the design, deployment and operation of Microsoft SharePoint for the State's 120+ Agencies, Boards and Commissions. Based on recent developments, and the strategy to consolidate the operation, maintenance and other functions of SharePoint as a centralized Service, the State has identified an opportunity to migrate SharePoint Services currently in operation in the Ohio Department of Jobs and Family Services (ODJFS) which also supports certain functions in the Ohio Department of Medicaid (ODM).

Due to the nature of the work contained herein and State priorities, the State requires all work as specified to be completed no later than June 30, 2015.

2.0 Project Requirements, Formal Deliverables and Scope of Work

Based on analysis of migration requirements and the existing DAS/OIT Service, the State has determined that the migration of ODJFS is required. In general the requirements are as follows:

2.1. Deliverable Identification

All items in this Supplement that are marked with a red star (★) shall be considered formal deliverables and be subject to the State's deliverable acceptance process.

2.2. Project Requirements and Scope of Work

- Migrate existing ODJFS Microsoft SharePoint 2013 servers to the DAS/OIT Service inclusive of Production, Development, Proof of Concept (POC) and User Acceptance environments that are currently maintained at the State of Ohio Computer Center (SOCC) and the ODJFS Air Center locations.
- ★ Identify and resolve any network (e.g., IP addresses, domain, name/numbering, firewall) or SharePoint server specific items (e.g., administration, user management, identities, roles and permissions) that are different from the ODJFS implementation in consideration of established DAS/OIT standards.
- Communicate and manage the resolution of any technical discrepancies utilizing the DAS/OIT Infrastructure Services division staff inclusive of Servers/Virtual Machines, Network, Storage, identity/active directory and underlying SharePoint databases (as recipients of these SharePoint servers) and ODJFS (as users of these SharePoint servers)
- ★ In parallel with the above, and under the supervision of DAS/OIT, configure, deploy and perform system testing functions to demonstrate to both DAS/OIT and ODJFS that the migration will not adversely impact day-to-day operations nor result in any loss of data. Design, implement and migrate ODJFS services to the new environment as to:
 - Utilize DAS/OIT provided Technical Infrastructure (collectively: servers, storage, networking, software licenses, identity/security/role information) inclusive of web access, SharePoint services and SharePoint databases
 - Migrate all data, SharePoint sites, business rules, processing logic, views and reports implemented at ODJFS utilizing SharePoint to the DAS/OIT SharePoint Service
 - Migrate any Microsoft or 3rd Party companion tools as identified (i.e., Metalogix, Nintex and Dell applications) to the DAS/OIT Service.
- ★ Develop migration validation test scripts, cases and reports sufficient for DAS/OIT and ODJFS to verify that all data has been migrated as agreed, user access integrity (roles, permissions and the like) is maintained and that any 3rd party tools or extensions as identified herein remain functional as per the existing ODJFS environment instances.

- Upon receipt of joint ODJFS and DAS/OIT acknowledgement of a successful migration based on the aforementioned validation tests, ensure that the ODJFS environment is backed up and decommissioned from the ODJFS environment and no longer accessible to end-users.

2.3. Project Management and Coordination Services

The Contractor will, in conjunction with an authorized Statement of Work arising from this RFP:

- Be responsible for the coordination and delivery of overall Project;
- Maintain the overall Project Workplan and Ensure deliverables have a detailed project sub plan as required by the State to ensure timely delivery and appropriate quality
- Ensure that all efforts have an effective version control mechanism for all documents within the project document library that will be maintained on a State provided Microsoft SharePoint site
- Ensure that an appropriate "Project Kickoff" occurs and that all integrated work plans are agreed to by the State from project commencement;
- Complete weekly status reporting adhering to the PMO policies;
- Work with the State leadership to ensure that the Project is staffed appropriately;
- Collaborate with the task areas to ensure appropriate cross-team communication and delivery.

2.4. Project Planning and Execution Requirements

The Contractor must produce a detailed Project Plan, in electronic and paper form, to the Project Representative for approval within five (5) business days after the State issues a purchase order or other written payment obligation under the Contract. The Contractor must lead a planning session which ensures the following:

- ★ A common understanding of the work plan has been established inclusive of State and Contractor dependencies and responsibilities as well as all identified deliverables and work products;

Thereafter, the Contractor must:

- Formally update the Project Plan, including work breakdown structure and schedule, and provide the updated Project plan as part of its reporting requirements during the Project; and
- Ensure the Project Plan allows adequate time and process for the development for the State's review, commentary, and approval.

3.0 Project Considerations

3.1. General

- The State does not anticipate substantive changes required to existing SharePoint server configurations other than those previously identified to comply with DAS/OIT standards (e.g., IP address, firewall, namespace, identity and end-user role analysis/realignment)
- The State will be responsible for Disaster Recovery design, implementation and testing and therefore these functions are out of Contractor scope for this engagement.
- Offerors are to refer to the existing ODJFS SharePoint architecture as provided in this solicitation for technical details, sizing and other pertinent details in formulating their proposal to the State.

3.2. Knowledge Sharing and Transfer

Contractor will design and provide the State a formal Knowledge sharing and transfer capability in connection the work contained in this Statement of Work.

During the Project, the Contractor will conduct informal information sharing and knowledge transfer services coincident with the delivery of the Services in this Statement of Work and on a formal basis at the conclusion of the project in such a manner as to ensure that State personnel assigned to support, develop, manage or operate the SharePoint platform are apprised of the contents of each environment inclusive of features, functions, extensions, known defects and workarounds and other information as to manage and communicate to DAS/OIT leadership (in general) and users of the system (specifically) as to the most effective use of the then current migrated services from ODJFS.

These services shall be designed and delivered in a manner as to provide the State assistance, cooperation and information as is reasonably necessary to help enable a smooth transition of the applicable services from ODJFS to DAS/OIT. As part of these services, Contractor will provide such information as the State may reasonably request relating to features, functions, extensions, configurations, release and programmer notes, FAQs and other delivery artifacts required to operate and maintain the system, and Contractor will make such information available to the State in a Microsoft SharePoint site provided by the State for this purpose.

3.3. Implementation Guide or Updates to Existing Implementation Guide

The State maintains documentation for the SharePoint environment that is designed as a reference for SharePoint Administrators and Developers. Based on the ODJFS/ODM migration to DAS/OIT's Service, the contractor will provide an implementation guide based on the migrated SharePoint sites, or utilize the existing guide and provide updates to this document that include any ODJFS/ODM or SharePoint 2013 specific updates. The current OIT Implementation guide is written using Microsoft Word, based on SharePoint 2010 and has the following table of contents for reference:

- ★ The contractor will review the existing OIT SharePoint implementation guide and either provide update or develop a new guide in totality based upon mutual agreement with the State in consideration of the relative efforts of updating or re-developing and the scope of the ODJFS/ODM/SharePoint 2013 updates.

Offeror Note, due to the fact that the existing guide contains State infrastructure details that are covered by ORC 149.433, additional details and contents of this document will not be made available through the Procurement Inquiry Process.

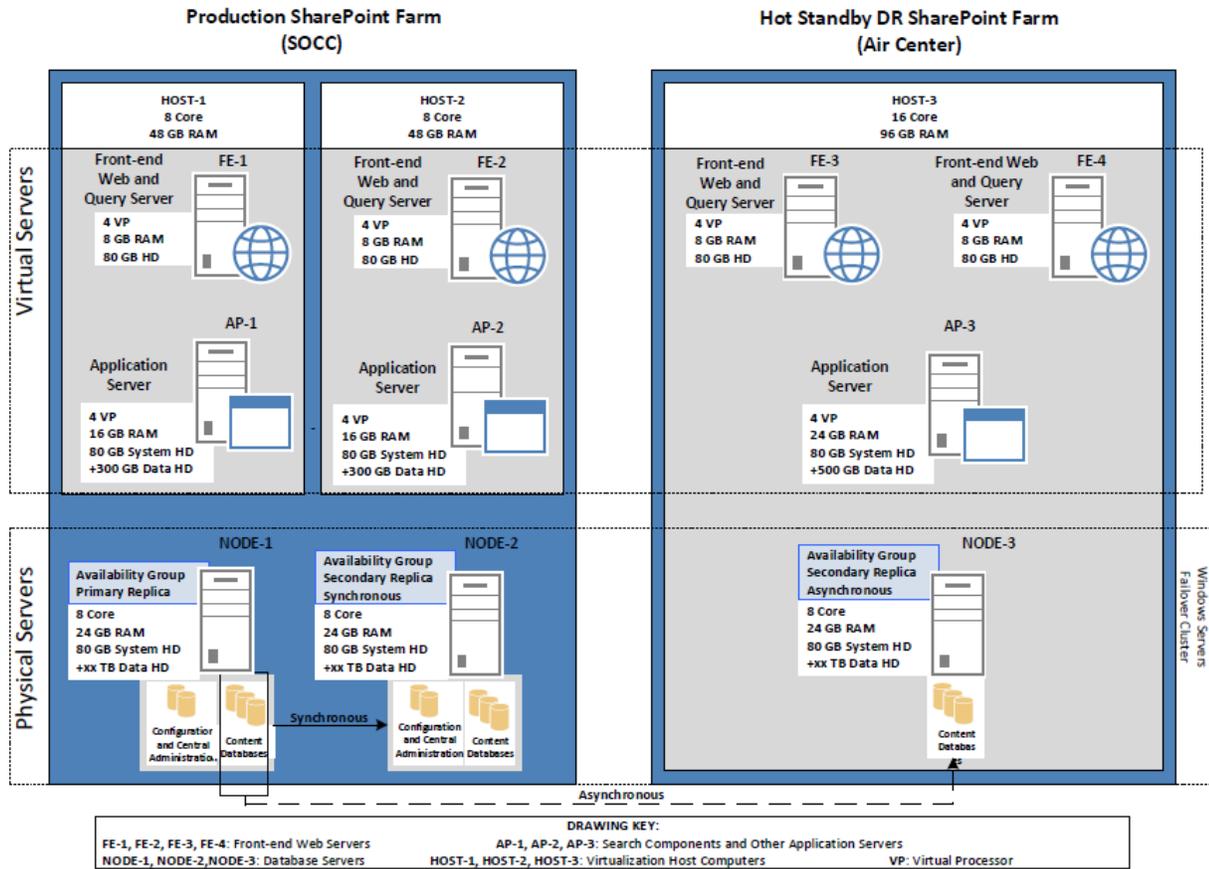
Existing OIT SharePoint Implementation Guide Table of Contents		Page
Table of Contents		
1	Introduction	1
1.1	Purpose	1
2	SharePoint 2010 Server Farm Architecture	2
2.1	Server Farm	2
2.2	SharePoint 2010 Server Roles	2
2.2.1	Web Front-End Servers	2
2.2.2	Application Servers	3
2.2.3	Database Servers	3
2.3	Service Architecture	3
2.3.1	Service Applications	4
2.3.2	Services on Server	4
3	SharePoint 2010 Topologies	8
3.1	Development Server Farm (Limited Farm)	8
3.2	Test Server Farm (Three Tier Small Farm)	9
3.3	Production Server Farm (Medium Farm)	10
4	SharePoint Server 2010 Installation	11
4.1	Review Required Permissions	11
4.2	Review Required Hardware and Software	12
4.3	Install SharePoint Server 2010	12
4.3.1	Run the Microsoft SharePoint Products Preparation Tool	12
4.3.2	Run Setup to Install SharePoint Binaries	14
4.4	Install Microsoft Office Web Apps	17
4.4.1	Run Setup to Install Microsoft Office Web Apps	17
4.5	Install Microsoft Project Server 2010	19
4.5.1	Run Setup to Install Microsoft Project Server 2010	19
4.6	Run Setup on Additional Servers in the Farm	20

5	Create SharePoint Server Farm	21
5.1	Create SharePoint Configuration and Central Administration Databases	21
5.2	Run SharePoint Products Configuration Wizard	21
5.2.1	Run the SharePoint 2010 Products Configuration Wizard on Additional Servers	25
6	Configuring the Farm	27
6.1	Register Managed Accounts	27
6.2	Create Service Applications	28
6.3	Configure Diagnostic Logging and Usage and Health Data Collection	32
6.3.1	Configure Diagnostic Logging	32
6.3.2	Configure Usage and Health Data Collection	33
6.4	Configure Outgoing E-mail	33
7	Creation and Configuration of My Site Host	34
8	Provisioning and Configuring User Profile Service Application	36
8.1	Provision User Profile Service Application	36
8.2	Configure Profile Import	37
8.2.1	Exclude Accounts from Import	39
8.2.2	Start Profile Synchronization	40
9	Configuring Search	42
9.1	Enabling SharePoint Foundation Search	42
9.2	Enabling SharePoint Server Search	43
10	PDF iFilter Installation	45
10.1	Installation and Configuration of Adobe iFilter (64bit)	45
10.2	PDF iFilter Verification	46
11	Migrating SharePoint Sites	48
11.1	Create Web Application	48
11.2	Configure Alternate Access Mappings (AAM)	51
11.3	Configure IIS Bindings	52
11.4	Test and Upgrade Content Database	53
11.4.1	Test Database	53
11.4.2	Upgrade Database	53
11.5	Validate Content Database	54
11.6	Add Administrators to Web Application	55
11.7	Set Default Quota Template	55
11.8	Filter People Picker to Active Directory Forests	55
11.9	Configure Object Cache User Accounts	55
11.10	Enabling BLOB Caching and Extending Execution Timeout	56
11.11	Enabling Page Output Caching	56
12	Post Configurations	58
12.1	Configure Quota Templates	58
12.2	Add SharePoint Root Folder	58
12.3	Modify Environment Variables	58
12.4	Add Central Administration Web site to the list of Trusted Sites	60
12.5	Disable Internet Explorer Enhanced Security Setting	60
12.6	Performance Tuning	61
12.6.1	Scheduling the Warm-up Script on SharePoint Servers	61
13	Resources	63

4.0 Existing ODJFS SharePoint Architecture

The following figures represent the current ODJFS SharePoint Architecture:

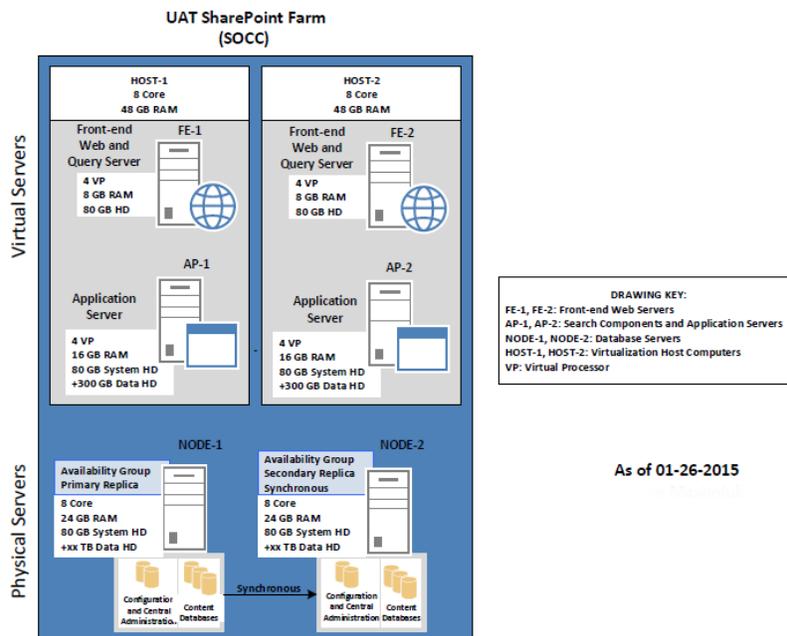
4.1. Production and DR:



Redundancy within the primary datacenter. Each SQL Node is configured as a stand alone. Each SQL Node hosts its own databases. When the primary Node fails, the databases are moved to secondary node in the same datacenter. Node 2 becomes the primary while storing two copies to databases until the original primary becomes available.

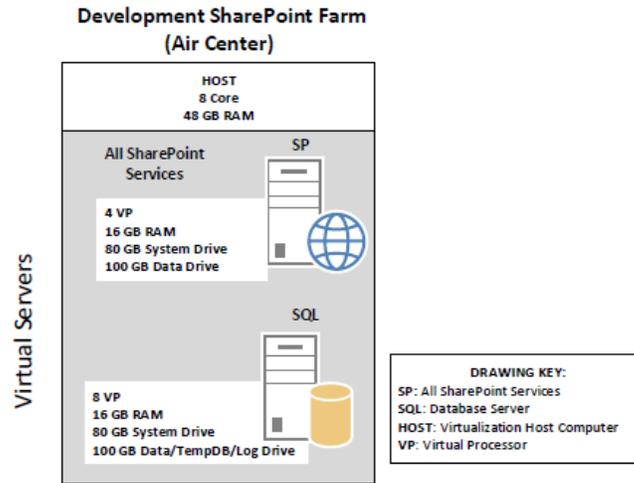
As of 01-26-2015

4.2. User and Acceptance Testing



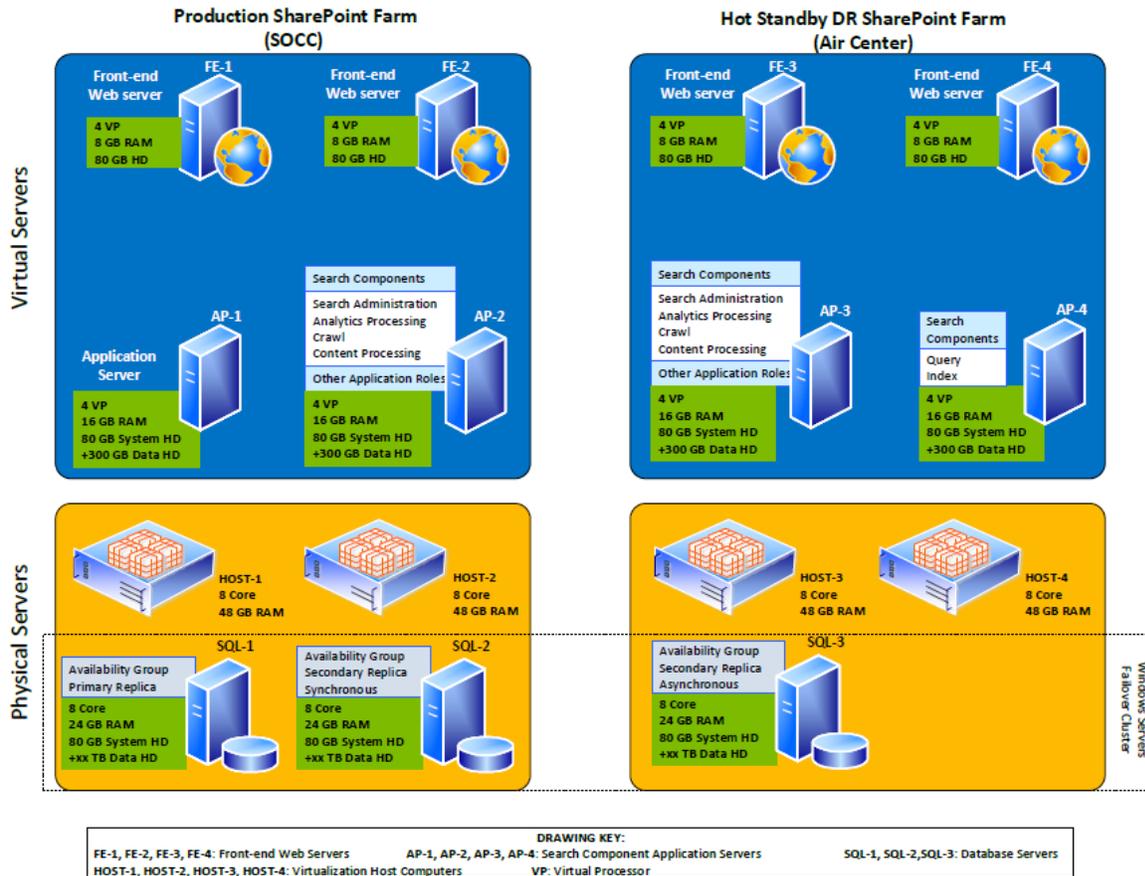
As of 01-26-2015

4.3. Development



As of 01-26-2015

4.4. General Functions and Additional Details



5.0 Technical Environment Statistics

The following table should be used by Offerors in the development of their proposal and are based on the current environments described in Section 4 of this Statement of Work.

Approximate Number of:	Production	Development	UAT
SharePoint Sites	89 including ODM	111 including ODM	210 including ODM
<p>Solutions. Within the above sites in Production, there are approximately:</p> <p>JFS</p> <ul style="list-style-type: none"> ▪ 165 total solutions. Of these, approximately: <ul style="list-style-type: none"> ○ 20% are generally composed of a single list with simple or no customization, InfoPath, and/or workflow. ○ 10% are generally composed of a single list some customization and minor workflow. ○ 20% are generally composed of a single list customization, InfoPath, and/or more complex workflows. ○ 15% are generally composed of multiple lists, high customization, InfoPath, and/or multiple-workflows ○ 25% are generally composed of multiple lists, high customization, medium complexity InfoPath, and/or multiple-workflows ○ 10% are generally composed of multiple lists, high customization, highly complex InfoPath, and/or multiple high complexity workflows. <p>ODM</p> <ul style="list-style-type: none"> ▪ One Intranet site with customized heavy branding and several customized workflows created for approvals and records management. ▪ 8 total solutions (not including the Intranet). Of these, approximately: <ul style="list-style-type: none"> ○ All of these are generally composed of multiple lists, high customization, complex InfoPath, and/or multiple high complexity workflows. <p>Workflows. Within the above solutions in Production, there are approximately:</p> <p>JFS</p> <ul style="list-style-type: none"> • 155 workflows of low complexity • 33 workflows of medium complexity • 20 workflows of high complexity <p>ODM</p> <ul style="list-style-type: none"> ▪ 16 workflows of low complexity ▪ 7 workflows of medium complexity ▪ 8 workflows of high complexity 			
SharePoint Databases	14	14	15
Data Size (Approximate)	139GB	136GB	144GB
End-Users	24,359 Total ~5000 active users	24,359 Total ~5000 active users	24,359 Total ~5000 active users
SharePoint Administrators	2	2	2
SharePoint Reports and Views	Native SharePoint reports. No SSRS	Native SharePoint reports. No SSRS	Native SharePoint reports. No SSRS
3 rd Party Extensions/Solutions - Dell	1 (Dell Quest Quick Apps)	1 (Dell Quest Quick Apps)	1 (Dell Quest Quick Apps)
3 rd Party Extensions – Kalmstrom	1 Kanban Task Manager for SharePoint	1 Kanban Task Manager for SharePoint	1 Kanban Task Manager for SharePoint
3 rd Party Extensions/Solutions - Metalogix	2 Change Manager Control Point	3 Change Manager Control Point Content Matrix	2 Change Manager Control Point
3 rd Party Extensions/Solutions - Nintex	1 (Nintex Workflows)	1 (Nintex Workflows)	1 (Nintex Workflows)