Statement of Work: SharePoint Migration Services

Supplement 1
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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 of 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.

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4.0 Existing ODJFS SharePoint Architecture

The following figures represent the current ODJFS SharePoint Architecture:

4.1 Production and DR:
4.2. User and Acceptance Testing
4.3. Development

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.

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<th>Approximate Number of:</th>
<th>Production</th>
<th>Development</th>
<th>UAT</th>
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<td>SharePoint Sites</td>
<td>89 including ODM</td>
<td>111 including ODM</td>
<td>210 including ODM</td>
</tr>
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</table>

Solutions. Within the above sites in Production, there are approximately:

JFS
- 165 total solutions. Of these, approximately:
  - 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.

ODM
- 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:
  - All of these are generally composed of multiple lists, high customization, complex InfoPath, and/or multiple high complexity workflows.

Workflows. Within the above solutions in Production, there are approximately:

JFS
- 155 workflows of low complexity
- 33 workflows of medium complexity
- 20 workflows of high complexity

ODM
- 16 workflows of low complexity
- 7 workflows of medium complexity
- 8 workflows of high complexity

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<th>SharePoint Databases</th>
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<td>Data Size (Approximate)</td>
<td>139GB</td>
<td>136GB</td>
<td>144GB</td>
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<tr>
<td>End-Users</td>
<td>24,359 Total ~5000 active users</td>
<td>24,359 Total ~5000 active users</td>
<td>24,359 Total ~5000 active users</td>
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<td>SharePoint Administrators</td>
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