



TEQSYS Consulting Services for [REDACTED] Migration

PRESENTED TO:

Texas Board of Nursing

PRESENTED BY:

TEQSYS, Inc.
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Customer Information	
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Preferred Delivery Start Date	TBD

1. PROJECT OVERVIEW

1.1 Purpose

The purpose of this proposal is to provide Texas Board of Nursing ("Customer") with the manpower and resources required to migrate its [REDACTED] email from the current [REDACTED] environment to a new [REDACTED] environment, in order to expand functionality and increase performance and reliability, as well as to set up and configure High Availability for SQL. During this Consulting Engagement, TEQSYS will provide the consulting services as described in Section 2 "Scope of Engagement."

1.2 Project Summary

TEQSYS Consultant will be performing the following tasks:

- A. Best-practices design and configuration of [REDACTED] environment
- B. Set up and configuration of [REDACTED] environment and HA for SQL
- C. Knowledge Transfer

Additionally, TEQSYS Consultant will be performing the following tasks in conjunction with CUSTOMER:

- A. Mailbox migration from current 2010 environment to new 2013 environment
- B. Decommissioning of [REDACTED] environment
- C. Testing and validation

1.3 Assumptions

This proposal is based on the following assumptions of the current CUSTOMER environment:

- ✓ Adequate hardware resources are available and in working condition, and hardware specifications currently meet or exceed system design requirements.
- ✓ [REDACTED] Server [REDACTED] OS has been installed and configured.
- ✓ Storage for the [REDACTED] environment has been configured.
- ✓ Active Directory and DNS are healthy.

- ✓ Appropriate patches have been applied.
- ✓ Working environment has been scanned and is free of all known computer viruses.
- ✓ Current mail-flow operations are working as designed.
- ✓ CUSTOMER will be responsible for the installation and configuration of third-party applications not mentioned in this document.
- ✓ TEQSYS is not responsible for importation of CUSTOMER users' [REDACTED] files on desktops.

1.4 Why TEQSYS?

At TEQSYS, we combine real-world expertise and the latest technologies to ensure your implementation is a secure, smooth, and well documented one.

We offer advantages to our customers that few companies can match: speed-to-market, flexibility, knowledge, efficiency and cost savings.

TEQSYS' value proposition is that we will provide practical solutions that enhance the value of our customer's investment resulting in better use of company information, improved service, increased productivity, a competitive advantage and reduced costs. Our extensive knowledge and experience in messaging, specifically with [REDACTED] allow for us to combine best practices and real world experience to deliver the highest quality of service to our customers. ***In addition, the knowledge transfer TEQSYS will provide to the CUSTOMER technical staff will equip them to complete the migration process successfully and support the new environment.***

We understand companies are sometimes overwhelmed with a tremendous burden as they increasingly rely on technology to drive business operations and growth. By supporting our customer's business processes and systems, we allow them to remain experts in their fields without the burden of having to become experts in the IT field.

2. SCOPE OF ENGAGEMENT

2.1 Current Environment

- Single [REDACTED] server deployment (no high availability)
- Approximately 125 [REDACTED]
- [REDACTED] utilized for Archiving

2.2 Vision

Perform mailbox transition (migration) of the existing [REDACTED] messaging system to [REDACTED] [REDACTED] for in-house application support and built-in features such as:

- High Performance
- High Availability with automated failover of services for reliability utilizing Database Availability Group (DAG) technology
- Scalability to accommodate ongoing growth
- Powerful Administration capabilities for ease of management
- Time Management
- Security
- Optimal end user experience

2.3 Proposed Environment

The solution proposed within this SOW will include the following:

- Two [REDACTED] Servers configured with high availability using the new Data Availability Groups (DAGs) in [REDACTED] (clustering technology), running all [REDACTED] roles

Note: [REDACTED] servers to be virtualized using [REDACTED] running at a minimum [REDACTED] Server [REDACTED] is recommended.)

2.4 Scope

This project will consist of the following phases:

PHASE I – Design and architect new [REDACTED] DAG environment

PHASE II – Install and configure new [REDACTED] DAG environment

PHASE III – Testing and knowledge transfer

PHASE IV – Mailbox transition from current [REDACTED] environment to [REDACTED] environment *

PHASE V – Post Migration Tasks and Decommissioning*

PHASE VI – Setup and Configuration of High Availability for SQL

**Phases IV and V to be performed in conjunction with CUSTOMER.*

3. PROJECT PLAN FOR EXCHANGE MIGRATION

3.1 Phase I – Design and architect new [REDACTED] environment

Assessment

TEQSYS will review the existing Active Directory and Exchange infrastructure to determine migration readiness. TEQSYS will analyze the following areas and discuss any issues or concerns with CUSTOMER.

1. Hardware
2. Domain Controller location
3. FSMO Roles
4. Operating System Version
5. Forest / Domain functional level
6. Distribution Groups
7. Internal and External Domain Name Resolution
8. Active Directory Replication
9. Internal and External Mail Flow
10. Active Directory Error logs in the environment (if applicable)
11. [REDACTED] Requirements
 - Technical Requirements
 - Disaster Recovery requirements
 - Desired functionality from stakeholder perspective
 - SMTP addressing / routing
 - Email policies
 - Administration Model
 - Number of mailboxes
 - Event logs
 - Server locations
 - User quotas
 - Number of public folders

- Existing [REDACTED] version(s)
- External email access
- Maintenance plans
- Anti-Virus / Anti-Spam solution
- Backup
- Mobile Devices

Design

Once the current infrastructure is reviewed, TEQSYS consultant will architect and submit a design to CUSTOMER of proposed [REDACTED] environment, including server, storage, network, and High Availability requirements to support the 2013 architecture. TEQSYS will provide the following deliverables to CUSTOMER:

- 1) Recommended [REDACTED] Design, based upon CUSTOMER's requirements and preferences
- 2) Migration Plan
- 3) Server roles
 - Mailbox Server(s)
 - Client Access Server(s)
- 4) Server location(s)
- 5) Define storage architecture (capacity and performance)
- 6) Mailbox quotas and message limits
- 7) Database design layout with HA
- 8) Design message routing topology
- 9) Define ant-virus / anti-spam strategy
- 10) Define client access methods (e.g. [REDACTED])
- 11) Email Archiving recommendations
- 12) Monitoring and Backup recommendations

Note: Prior to implementation, TEQSYS Consultant will review hardware requirements and architecture with CUSTOMER staff.

3.2 Phase II – Install and Configure new [REDACTED] environment with DAG Failover

Once the proposed Design has been discussed and approved by CUSTOMER, and all necessary hardware and software prerequisites have been installed, TEQSYS consultant will install and configure the new [REDACTED] environment. Testing will occur upon completion of each of the following steps to ensure proper message flow and client connectivity.

1. Back-up current Domain Controllers, Test Back-up Media *(to be performed by CUSTOMER in advance)*
2. Back-up of current email, Test Back-up Media *(to be performed by CUSTOMER in advance)*
3. Extend Active Directory [REDACTED]
4. Prepare Active Directory [REDACTED]
5. Install Prerequisite tools on [REDACTED] Servers
6. Import all SSL UCC certificates.
7. Install and configure new [REDACTED] Mailbox Server roles with High Availability using DAG technology
8. Install and configure new [REDACTED] Client Access Server(s)
9. Configure Storage for Mailbox Servers
10. Test the following: Mobile Devices, [REDACTED] (internal and external)
11. Enable Offline Address Book Web-based distribution for [REDACTED] Clients
12. Perform test failover cluster

3.3 Phase III – Testing and knowledge transfer

TEQSYS will test the [REDACTED] implementation to ensure proper functionality. During this engagement, TEQSYS will work with the CUSTOMER team to provide knowledge transfer including, but not limited to, how to setup, configure, and administer the new messaging system, and point out the key features and functionality in [REDACTED]

At this time, the TEQSYS consultant may also make recommendations to CUSTOMER related to the improvement of data security, availability, and overall performance of the new Exchange environment. Additional functionality such as email filtering, archiving, and backup may also be discussed at this time as a separate engagement. In the event that, following the execution of this SOW, CUSTOMER wishes to modify the scope of this project (e.g. implement additional features or additional technologies) CUSTOMER should notify the TEQSYS team of requested changes. TEQSYS will create an addendum to this SOW, which will include added deliverables and associated pricing. TEQSYS Consultant will not proceed with modifications until the addendum has been approved and executed by both CUSTOMER and TEQSYS.

3.4 Phase IV – Mailbox Transition from [REDACTED] to [REDACTED] (to be performed in conjunction with CUSTOMER)

This phase is the most time consuming out of all of the phases due to the time it takes to perform the mailbox move process. TEQSYS will consult with CUSTOMER to determine the migration schedule in a phased approach. TEQSYS will migrate a subset of mailboxes, test, and then handoff to customer to complete the mailbox migration.

Tasks: Migrate mailboxes from [REDACTED] Mailbox Server

3.5 Phase V – Post-Migration Tasks (to be performed in conjunction with CUSTOMER)

Once all testing is complete, TEQSYS and CUSTOMER staff will complete necessary post-migration tasks.

1. Redirect [REDACTED] Web Access traffic [REDACTED] Access Server(s)
2. Redirect Mobile Device traffic to [REDACTED] Access Server(s)
3. Redirect [REDACTED] traffic to [REDACTED] Access Server(s)
4. Create Send/Receive [REDACTED]
5. Redirect Inbound/Outbound Internet mail flow to [REDACTED]

3.6 Phase VI – Setup and Configuration of High Availability for SQL

1. Prepare second SQL instance for hosting Mirror database
2. Prepare third SQL instance for [REDACTED] (** only needed if using automatic failover option)
3. Prepare Principal database for full recovery
4. Backup and restore Principal database to second SQL instance using NoRecovery mode
5. Backup and restore Principal database log to second SQL instance using NoRecovery mode
6. Configure [REDACTED]
7. Establish database Mirror

4. PROJECT TIMELINE

TEQSYS' Consulting Services to commence on a date agreed upon by TEQSYS and CUSTOMER. Services may be performed during normal business hours or after hours as required by CUSTOMER. Services may be performed either onsite or remotely, depending upon project requirements. Following is an **estimated schedule** for this engagement broken down by task:

Project Task	Timeframe	Engagement Location
Solution Design	8 Hours	Remote
Implementation & Configuration	32 Hours	Onsite/Remote
Testing (Migrate subset of mailboxes)	16 Hours	Remote
Migration	40 Hours	Remote
Decommissioning of old environment	8 Hours	Onsite/Remote
Setup & Configuration of HA for SQL	65 Hours	Onsite/Remote

5. PROJECT FEES

The pricing provided below reflects the costs for the initiatives as described in this document. This proposal is valid for a period of 90 days unless extended in writing by TEQSYS.

Description	Price
TEQSYS Consulting Services - [REDACTED] Design, Implementation/Migration	\$175/hour
<i>*Total hours not to exceed 170 hours.</i>	

6. CUSTOMER RESPONSIBILITIES

To ensure the engagement's success and the agreed upon completion of deliverables, the customer has the following responsibilities prior to and during the Consulting Services engagement:

Prior to TEQSYS Consulting Services Arrival:

1. Discuss the consultation requirements with the TEQSYS consultant for clarification, agreement of objectives, and for understanding of the current environment.
2. Agree to schedule resources in advance per agreement between customer and TEQSYS. Provide a primary point of contact that can escalate issues and assist in resolving problems that fall outside of TEQSYS' control.
3. The end user must submit a Purchase Order (P.O.) to TEQSYS for services fees.

During TEQSYS Consulting Services Consultation:

1. Provide the necessary hardware and software.
2. Customer is responsible for the actual content of any data file, selection and implementation of controls on its access and use, and security of the stored data.
3. Customer will identify and make the interpretation of any applicable federal, state and local laws, regulations and statutes and insure that products of the system meet those requirements.
4. Provide resources to work in conjunction with the TEQSYS consultant so that the TEQSYS consultant can successfully obtain necessary information and access to required hardware, network, and software environments.
5. Provide necessary security access to customer premises in accordance with current security policy (if applicable).
6. Provide appropriate facility for network connection. Access to workspace facilities will be established starting on the beginning of the first day of the engagement (if applicable).
7. Provide an appropriately configured and available hardware and software environment for product implementation, inclusive of operating system and application software, network connectivity, disk and tape devices for data backup and recovery (where applicable).
8. Customer is responsible for the cost of any third party tools and consulting time required to export/import email from hosted environment.

7. CUSTOMER ACCEPTANCE

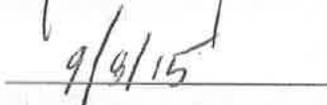
I have read this Statement of Work in its entirety and agree to its scope. I authorize TEQSYS to deliver consulting services and for invoicing CUSTOMER for these services as established in this Statement of Work. I have the authority to authorize these services and payment, and will provide payment to TEQSYS and to support this request within 30 days of invoicing. I acknowledge that no further written agreement between TEQSYS and CUSTOMER will be required before services commence and CUSTOMER issues a purchase order or pays for the services.

I hereby accept TEQSYS' proposal and subject to the initiation of a purchase order authorize TEQSYS to proceed with the proposed effort.

For: CUSTOMER



(Company Representative)



(Date)