# 

Statement of Work

–Office 365 Exchange Migration

Prepared for

Prepared by

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This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order 6ZAF201-260353-308257 and describes the work to be performed (Services) by Microsoft (“us,” “we”) for State Information Technology Agency and Gauteng Provincial Government (“”, “”, “Customer,” “you,” “your”) relating to – Assistance for Office 365 Exchange migration (“project”).

This SOW and the associated Work Order expire 30 days after their publication date, unless signed by both parties or formally extended in writing by Microsoft.

Introduction

engaged Microsoft to provide them with a proposal to move ’s email from the hosted service provider to Exchange Online. This will include the migration of 39 000 mailboxes to Exchange Online. The current hosted Exchange organization was created in the Active Directory Forest and is dedicated to with no other customers services from this platform.

This SOW describes the Microsoft Services Assistance for Office 365 Offer for the Microsoft Office 365 multitenant service and does not include the purchase or activation of the Office 365 service, which must be purchased by the customer through a separate order. The Office 365 service is not customizable and cannot be modified beyond what is outlined in the Office 365 Service Descriptions. Prior to signing the Work Order that references this SOW, the customer will have had an opportunity to review the latest Office 365 Service Descriptions. Microsoft strongly recommends that the customer review those Service Descriptions with relevant internal stakeholders. The customer acknowledges that the Service Descriptions meet or exceed the customer’s minimum requirements for the selected Services.

Microsoft Services will collaborate with the customer and Microsoft FastTrack and follow the standard Office 365 FastTrack deployment methodology to carry out the Services identified in this SOW.

# Project objectives and scope

## Objectives

The objectives of this project are to provide additional planning, project management, and technical support for onboarding to Office 365 for customers using the Microsoft FastTrack deployment approach.

The project will include the following components.

| ID | Component name |
| --- | --- |
| TPC-01 | Office 365 tenant planning and configuration |
| NET-01 | Network readiness assessment and planning for Office 365 |
| REM-01 | General remediation support |
| AAD-01 | Azure Active Directory integration |
| AAD-02 | Azure Active Directory Conditional Access and Azure Multi-Factor Authentication |
| EXO-01 | Exchange Online enablement |
| ITSM-01 | Operations readiness planning—support and Service Desk enablement and monitoring |
| ACM-01 | Adoption and Change Management assistance |
| COM-01 | Communications management |

## Areas in scope

### General project scope

The Assistance for Office 365 project components and scope are specified in the following table. All activities are to be completed in or between a single on-premises environment and a single Office 365 tenant unless otherwise specified.

If at any time, the Customer would like to add additional Office 365 services to the scope of this project, Microsoft Services will deliver a two-hour session to review the FastTrack benefit for the desired Office 365 service and perform a discovery of services needed for the Customer’s implementation. If the additional Office 365 service is to be added to the scope of this project, the change management process in section 2.4.3 will be followed.

| Component (ID) | Description | Assumptions |
| --- | --- | --- |
| Office 365 tenant planning and configuration  (TPC-01) | * Delivery of an Office 365 service overview to project resources * Creation of a basic tenant plan and identification of remediation tasks needed for basic service enablement, including client and network connectivity * Configuration of an Office 365 tenant that is based on customer-provided requirements, is limited to basic tenant-level settings, and excludes detailed policy design and configuration * Configuration for automated assignment of Office 365 licenses based on customer-defined profiles using either Azure Active Directory group-based licensing. | * The customer will use an Office 365 tenant, which will be one of the following types: commercial, government community cloud, or education. * The customer is either creating a new tenant or its existing tenant can be used without troubleshooting or rework. |
| Network readiness assessment and planning for Office 365 (NET-01) | * Review the current NPA reports produced by Premier and the implementation of the recommendations. * Use NPA reports as input to the Design and Plan document | * If the recommendations made in the NPA Reports has not been implemented it will cause a delay in the start of the migration |
| General remediation support (REM-01) | * Work done at customer direction to provide technical guidance and assistance during the completion of tasks documented in the preparation checklist deliverable (limited to 200 hours over a duration no longer than 3 weeks) |  |
| Azure Active Directory integration (AAD-01) | * Change Configuration of Azure AD authentication to pass-through authentication. * Enablement of the Azure AD seamless single sign-on feature. | * currently use password hash synchronization but the project will change the authentication method to pass-through authentication to enable to support the current Account locked out, Account expired and Password expired policies. * Enable Azure Active Directory Smart Lockout polices to assist in locking out bad actors |
| Azure AD Conditional Access and Azure Multi-Factor Authentication (AAD-02) | * Configuration of Azure Multi-Factor Authentication (MFA) to customer specifications (limited to cloud-based invocation from Azure AD) * Design and implementation of Azure AD conditional access policies in the tenant (up to 10 policies) * If the customer is licensed for Azure AD Premium P2, enablement and configuration of Azure AD Identity Protection to customer specifications, and demonstration of the service for the customer | * Only applications that are integrated with Azure AD will be subjected to MFA or conditional access policy. * If Office 365 will be protected by the solution, the customer has deployed an Office client that supports modern authentication (Office 2013 or Office 2016). * If access is to be restricted to managed or compliant devices, Microsoft Intune will be used for mobile device management (MDM) and hybrid Azure AD join will be used for domain-joined computers. Enablement of these services is scoped separately. |
| Exchange Online enablement (EXO-01) | * Enablement of Microsoft Exchange Online and configuration of baseline tenant-level settings. * Configuration of internet mail flow with up to 5 mail hygiene rules or establishment of routing through a customer-provided relay * Installation and configuration of a supported version of Exchange Server as a management server on an on-premises server to support Exchange object provisioning and management   **Exchange Hybrid**   * Configuration of Exchange hybrid between the customer’s on-premises Exchange environment and Exchange Online * If the customer does not already have Exchange servers that are suitable for Exchange hybrid configuration, installation and configuration of a supported version of Exchange Server on up to 2 servers in a single site to serve as hybrid servers * Pilot 1: Support during pilot migration for up to 50 mailboxes from Exchange on premises to Exchange Online through the FastTrack Data Migration benefit, up to 2 weeks in total duration * Pilot 2: Support during pilot migration for up to 100 mailboxes from Exchange on premises to Exchange Online through the FastTrack Data Migration benefit, up to 2 weeks in total duration   **Velocity Mailbox Migration Assistance**   * Full-time support during the velocity ramp phase of migrations from Exchange on-premises to Exchange Online through the FastTrack Data Migration benefit, up to 30 weeks in duration. * Full time support includes: * Troubleshooting migration failures * Troubleshoot and fix client autoconfiguration failures * Troubleshoot mail routing issues * Assist and take ownership related to Microsoft technologies involved in the project | **Exchange Hybrid**   * The customer has a functional, supported version of Exchange Server. * The customer has a single Exchange organization to integrate with Exchange Online. * The current Exchange organization is created in the Active Directory Forest and is dedicated to . * The Exchange organization is not hosting any customer outside of the organization. * The Exchange organization does not have any custom control panels configured that are used for administration purposes * The customer will execute all required client readiness and configuration activities.   **Velocity Mailbox Migration Assistance**   * Velocity migration timelines was calculated doing 1 300 mailboxes a week and we assumed:   + The business will be able to absorb the rate of change required   + The helpdesk will be able to cope with the support during the migration   + Customer remediate shared mailboxes in time   + Customer remediate applications and services the integrate with Exchange in time   + If this is not possible and an extension to the migration period is required, this will result in a change request and will be managed through the Change management process. * The customer is using the FastTrack Data Migration benefit as defined in the Data Migration, Migration to Exchange Online section of the FastTrack Center Benefit Overview located at <https://aka.ms/ftcmigration>.   The workload for each deployment technician is calculated based on 32 users per technician per day deployed.   * Microsoft will provide 2 days post mailbox migration support |
| Operations readiness planning—support and Service Desk enablement and monitoring (ITSM-01) | * Creation of a Service Dependency Map for Office 365 that includes Exchange Online * Identification and documentation of a monitoring approach for Office 365, included recommended interfaces for monitoring the service * Development of a support process flow for Office 365, including integration with Microsoft Support * Identification and documentation of the escalation path, points of demarcation, and interfaces between the current internal service desk and Microsoft Support * Identification of the Office 365 monitoring, support or incident roles and responsibilities | * In-scope processes are already in existence within the customer environment. * Customer participants in the workshops are empowered to make final decisions on operational recommendations and plans. |
| Adoption and Change Management assistance (ACM-01) | Four weeks in which a Microsoft resource will provide guidance on adoption and change management to the Customer, with a focus on managing resistance to the Exchange Online migration The Customer will gain an improved understanding of technology adoption challenges and the key next steps. |  |
| Communications Management (COM-01) | Post four weeks of ACM assistance, enablement and implementation of the communication plan is included.  Develop a Communication Plan that mainly focuses on using online tools to drive the communication messages and awareness. | The communication plan will be focused on an overall communication to all users as well as communication to each batch of users that are migrated  Communication tools will be limited to current communications platform such as email and, intranet |

### Software products and technologies

The products and technology that are listed in the following table are required for project delivery. The customer is responsible for obtaining all identified licenses and products. Microsoft assumes that any product version used during the project is either in mainstream support or is covered by an extended support agreement procured by the customer.

| Component ID | Product and technology item | Version | Ready by |
| --- | --- | --- | --- |
| Not applicable | Office 365 licenses | Any | Start of the Enable phase |
| AAD-02 | Azure Active Directory Premium licenses | P1 or P2 (P2 is required for Azure Active Directory Identity Protection) | Start of the Enable phase |
| Modern Office client | Office 2016 or Office 2013 | Start of the Enable phase |

### Environments

The following environments will be required to deliver the project.

| Environment | Location | Responsibility | Ready by |
| --- | --- | --- | --- |
| Production | Customer | Customer | Project start |

### Testing and defect remediation

#### Testing

The following testing is included in the scope of the project.

Should the customer be responsible for testing, the Microsoft effort to support that activity is identified. If additional time is needed for Microsoft testing support, then it can be requested through the Change management process described in this SOW.

| Component ID | Test type  (environment) | Description | Responsibility | | |
| --- | --- | --- | --- | --- | --- |
| Has responsibility  for testing? | Provides data or test cases | Provides guidance and support |
| All | Validation testing (production) | Test cases will be run in the production environment to validate that the implemented solution is functioning as designed. All testing will occur in the production environment unless otherwise specified. | Microsoft | Microsoft | Customer |

#### Defect remediation

If defects are identified during testing, the priority of the item will be jointly agreed-upon by the Customer and Microsoft. Defect prioritization is defined in the following table.

| Priority | Description | Remediation in scope? |
| --- | --- | --- |
| P1 | **Blocking defect**  Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship and the project team cannot achieve the next milestone until such a defect is corrected. | Yes |
| P2 | **Significant defect** This type of defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation. | Yes |
| P3 | **Important defect** It is important to correct this type of defect. However, it is possible to move forward into production through the use of a workaround. | No; the problem will be logged. Remediation will be performed through an agreed-upon change request only. |
| P4 | **Enhancements and low priority defects** P4 defects consist of feature enhancement and cosmetic defects. These include design requests that vary from original concepts. | No; the problem will be logged. Remediation will be performed through an agreed-upon change request only. |

## Areas out of scope

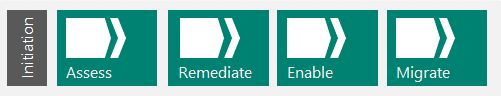
Any area not explicitly included in the Areas in scope section is out of scope for Microsoft during this project. Areas out of scope for this project are listed in the following table.

| Component ID | Area | Description |
| --- | --- | --- |
| All components | Product licenses and subscriptions | Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included. |
| Hardware | Microsoft will not provide hardware for this project. |
| Client | Deployment and configuration of client software is out of scope for the project unless explicitly listed as in scope in the General project scope. |
| Integration with third-party software | Microsoft will not be responsible for integration with third-party software. |
| Product bugs  and upgrades | Product upgrades, bugs, and design change requests for Microsoft products. |
| Source code review | The customer will not provide Microsoft with access to non-Microsoft source code or source code information. For any non-Microsoft code, Microsoft Services will be limited to the analysis of binary data, such as a process dump or a network monitor trace. |
| Process reengineering | Designing functional business components of the solution is not included. |
| Organizational change management | Designing—or redesigning—the customer’s functional organization is not included. |
| End-user communications | Planning or undertaking of end-user communications is not in scope. |
| Lab environment | Creation of a development or testing lab environment is not included. |
| Training | Formal user training or the creation of training materials is not in scope. |
| Custom solution development | Any custom solution development is not in scope. |
| Performance testing | Performance or stress testing for any environment is not included. |
| NET-01 | Network assessment | Assessment of connectivity or traffic not associated with Office 365 connectivity  Assessment of remote access connections (VPNs) and wireless networks  Review, design, or configuration of the quality of service on the network  Review of network equipment configuration  Design, implementation, or configuration of any network component  Load testing on network connections. This assessment is limited to single-session testing from a given site to Office 365  Any troubleshooting activity on the network  Network path analysis beyond a proxy service (when used) |
| AAD-01 | **AD FS Farm Deployment**  No AD FS Farm will be deployed as part of this project. | **AD FS Farm Deployment**   * Deployment of AD FS Farm, customer is using AAD Connect with password# Sync which could be changed to pass through authentication if required. |
| AAD-02 | Azure Multi-Factor Authentication server and third-party providers | Deployment of the on-premises Azure MFA Server is outside the scope of this project, as is integration with a third-party multi-factor authentication provider. |
| EXO-01 | Exchange Online detailed policy design and configuration | Exchange Online enablement excludes design and configuration of digital loss prevention (DLP) rules and retention policies are out of scope for the project unless explicitly listed as in scope in the General project scope section. |
| ACM-01 | Training | Formal user training related to products or technology that includes workshops, classrooms, and books is not in scope. |
| Branding | Corporate branding design and related graphic elements are not in scope. |
| Business case development | Business case creation for the technology investment is out of scope. |
| ITSM-01 | Implementation and Support | * Day-to-day operational support of the existing environment. * Process implementation * Ongoing process improvement * Any additional scorecards (except those provided by Office 365) * A service catalog * A fully documented and functional Incident Management process * Setup of a Service/Help Desk organization |
| COM-01 | Additional communications platforms | * Only existing communications platforms will be used for communication |

# Project approach, timeline, and deliverable acceptance

## Approach

The project will be structured following the Online Solution Lifecyle delivery methodology and will consist of 4 distinct phases: Assess, Remediate, Enable, and Migrate. Each phase has distinct activities and deliverables that are described in the following sections.



The activities for each in-scope project component will be organized into these phases, and components will generally progress through project phases together. The Assess phase activities for most components, for example, will be completed before the project proceeds to the Remediate phase, and the Remediate phase activities for most components will be completed before the project proceeds to the Enable phase. Microsoft reserves the right to delay the start of individual project components, when necessary, for the purposes of work prioritization or staffing optimization. During the Assess phase, a project plan will be produced that documents the detailed delivery schedule.

As part of this project, various deliverables will be created. If a deliverable requires formal review and acceptance (a process described in the Deliverable acceptance process section), this is indicated in the following sections.

### Engagement initiation

Before beginning the project, the following prerequisites must be completed.

| Category | Description | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | * Conduct a preinitiation call to initiate team formation and communicate expectations. * Document the project launch prerequisites using input from this SOW. * Track the status of launch prerequisites and adjust the engagement initiation phase start date accordingly. * Conduct a detailed walk-through of the SOW with the customer to agree on an initial project schedule and approach. |
| **Customer activities** The activities to be performed by the Customer | * Attend and participate in the preinitiation call. * Assign project initiation and launch prerequisite responsibilities to accountable customer leadership and establish target completion dates. * Complete the project initiation and launch prerequisites. * Staff the project with the required customer resources in the time frames that were agreed upon in the preinitiation call. |

### General project activities

The following table describes the general activities for the project, organized by phase. These activities will be combined with the activities defined for in-scope [project components](#_Project_components_and) to establish the overall project approach.

| Category | Description | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Prepare for, and conduct, the project kickoff meeting. * Document, discuss, and review conditions of satisfaction and define critical success factors of the project. * Create a risks, actions, issues, decisions (RAID) log and review it with the customer. * Generate a project communication matrix that can be used to identify meeting cadence, key stakeholders, and the general communication strategy. * Create a preliminary project status report to review with the customer Project Manager and refine as necessary based on that person’s input. * Deliver workshops and complete other Assess phase activities for in-scope components as defined in [Project components and deliverables](#_Project_components_and) section. * Produce a preparation checklist that details the tasks that are needed to complete the in-scope Enable phase activities, including the resources that must be procured by the customer. * Produce, design, and plan the project documentation. * Produce a project plan for Microsoft project activities.   **Remediate phase**   * Generate a weekly project status report and facilitate project status review meetings with the project team. * Provide technical guidance and assistance, and answer questions during the customer-led completion of identified preparation tasks. * Provide input on user communications related to the project. * Facilitate preparation checklist review meetings with the customer to track activity status, prioritization, and completion timelines.   **Enable phase**   * Produce test cases that will be used to validate the implemented Solution functions as designed. * Complete Enable phase activities for in-scope components as defined in [Project components and deliverables](#_Project_components_and) section. * Complete in-scope testing for the project. * Produce delivery summary documentation for the project. * Facilitate project status meetings with the project team to track the activity status, prioritization, and completion timelines for project work items and active RAID log entries. * Generate a weekly project status report and facilitate weekly project status review meetings with the project team.   **Migrate phase**   * Complete Migrate phase activities for in-scope components, as defined in [Project components and deliverables](#_Project_components_and) section |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Facilitate the interaction with current mail service provider to ensure access to the hosted mail system to run required scripts * Provide project manager resources to work with the Microsoft project manager and manage customer resources and assigned project activities. * Manage scheduling and logistics for project workshops. * Provide project resources and subject matter experts (SMEs) to participate in workshops and follow-up meetings. * Make necessary design and planning decisions in a timely fashion to facilitate completion of the Assess phase within the timelines documented in [Timeline](#_Timeline) section. * Review the RAID log with the Microsoft project manager and assign appropriate resources to actions, issues, and risks. * Develop a project communication matrix. * Provide templates or review existing templates that will be used for weekly status reports and steering committee reports * Review all Assess phase deliverables. * Produce and manage the project plan for customer project activities.   **Remediate phase**   * Complete all tasks identified in the preparation checklist and procure all required resources for the project within the timelines established for remediation, as documented in [General project scope](#_General_project_scope) section. * Update the project plan with updates to project activities and status received from customer project team members. * Assist in facilitating weekly project status review meetings. * Prepare user communications for the project.   **Enable phase**   * Provide required production access to Microsoft resources or resources who can work alongside Microsoft to facilitate completion of in-scope implementation tasks. * Update the project plan with status received from customer project team members. * Review test cases and other Enable phase project deliverables. * Participate in in-scope testing for the project and complete any testing activities assigned to the customer. * Assist in facilitating weekly project status review meetings. * Manage the change management process to facilitate timely completion of production implementation tasks. * Take ownership of the solution for ongoing management and support. * Manage all end-user communications associated with implementation tasks.   **Migrate phase**   * Manage scheduling and end-user communications for in-scope Migrate phase activities. |
| **Key assumptions** | * If the defined duration or effort for remediation is exhausted before the completion of critical path (blocking) remediation and preparation tasks, a change will be submitted following the [Change management process](#_Change_management_process) in order to adjust project scope, timeline, and cost as necessary. * The customer will make all necessary design and planning decisions during the Assess phase of the project. Acceptance of the Design and Plan deliverable constitutes finalization of all options for implementation. Changes to customer decisions after deliverable acceptance will be subject to a project change request. * Microsoft resources will have the required access to the hosted Exchange mail environment to complete in-scope implementation tasks |

#### General project component deliverables:

Microsoft will produce the following project deliverables that include content from in-scope project components in the phases shown. Not all components will be covered in all deliverables, and [Project components](#_Project_components_and) section documents how each component will be covered in these project deliverables. Deliverables will either be prepared as combined documents with content for all in-scope components, or multiple component-specific instances of these deliverables will be produced. During the Assess phase of the project, Microsoft and the customer will mutually agree on a consolidated or per-component deliverable structure and then use that structure for all deliverable acceptance.

Additional component-specific deliverables may be produced for the project and any such deliverables are described in section [Project components and deliverables.](#_Project_components_and)

| Name | Description | Phase | Acceptance required? | Acceptance Criteria | Responsibility |
| --- | --- | --- | --- | --- | --- |
| Project plan | Key Microsoft activities, milestones, dependencies, and durations | Assess | No | The plan reflects the activities, dependencies and durations as agreed with the Customer | Microsoft |
| Preparation checklist | An Excel spreadsheet that documents the tasks that must be completed by the customer and the resources that must be procured in order to complete the in-scope work. | Assess | Yes | The spreadsheet accurately documents the tasks that need to be completed and resources that need to be procured | Microsoft |
| Design and plan | A Word document that captures design decisions made during the workshop, documents the design for the solution, and details the high-level plan for completion of the in-scope work. | Assess | Yes | The document accurately captures the design decisions made during the workshops, documents the design for the solution and details the high-level plan for completion of in-scope work. | Microsoft |
| Test cases | An Excel spreadsheet that documents the test cases that will be used to validate that the implemented solution functions as designed. | Enable | Yes | The test cases are documented and will be used to validate the implemented solution functions | Microsoft |
| Delivery summary | A Word document that summarizes the work completed, provides any relevant operational guidance, and documents any recommended next steps. | Enable | No | N/A | Microsoft |

### Project components and deliverables

The following subsections describe the activities for in-scope project components, organized by overall project phase. These activities will be combined with the [general project activities](#_General_project_activities) to establish the overall project approach. The unique deliverables for each component, and the project deliverables to which each component contributes, are also described below.

#### Office 365 tenant planning and configuration (TPC-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Deliver configuration assessment workshops to provide an overview of Office 365 enablement activities and identity remediation and enablement requirements for the customer’s Office 365 deployment.   **Enable phase**   * Provide guidance to the customer related to technical resource readiness and recommended training for ongoing support of in-scope services. * Provision the customer’s Office 365 tenant by using its licenses if the tenant does not already exist. * Configure user license assignment using the group-based licensing feature. * Conduct a tenant configuration workshop to gather customer design decisions and apply the configuration to the tenant. * Provide architectural and technical assistance that is specific to the on-premises and Office 365 environment and supports required configuration changes. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | * Provide technical leads who can provide service usage requirements that will be used for the base tenant configuration. * Provide technical resources who can implement required on-premises and service configurations needed for service enablement. * Provide licenses for Office 365 tenant creation if the customer has not already provisioned its tenant. * Provide up to 4 licensing profiles that will be used to configure automated licensing. * Make decisions for configuration options presented in the tenant configuration workshop. |
|  |  |
| **Project deliverables** Content for this project component will be included in these project deliverables | * Preparation checklist * Design and plan * Test cases * Delivery summary | |

#### Network readiness assessment and planning for Office 365 (NET-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**  Review the current NPA reports and the implementation of the recommendations.  Creation of a bandwidth plan for up to 5 personas  Use NPA reports as input to these documents. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Review findings with Microsoft and confirm findings were implemented as documented in Network Performance Assessment (NPA) Reports |
| **Key assumptions** | Recommendations from the NPA Reports were implemented. |
| **Project deliverables** Content for this project component will be included in these project deliverables | N/A |

#### Azure Active Directory integration (AAD-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Conduct an assessment and planning workshop to gather requirements, information about the current environment, and customer design decisions for Azure AD integration. * Assist the customer with the running of the Office 365 IdFix tool to identify conflicts and formatting errors in AD DS that need to be remediated prior to directory synchronization.   **Enable phase**   * Change configuration of Azure Active Directory Connect to support pass-through authentication and install agents on the identified servers. * Configure the Azure AD seamless single sign-on feature if the customer elects to use it and is not using federated authentication. * Configure authentication for customer domains in Azure AD. * Configure and demonstrate Azure AD B2B. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Participate in the assessment and planning workshop, communicate requirements, provide current environmental information, and make design decisions. * Run the Office 365 IdFix tool in each in-scope AD DS forest and provide the results to Microsoft for evaluation. The tool requires read-only permissions in AD DS.   **Remediate phase**   * Complete IdFix error remediation in the on-premises AD DS forest and user principal name (UPN) changes, if necessary.   **Enable phase**   * Assist Microsoft, as necessary, during production implementation tasks. |
| **Key assumptions** | None |
| **Project deliverables** Content for this project component will be included in these project deliverables | * Preparation checklist * Design and plan * Test cases * Delivery summary |

#### Azure Active Directory Conditional Access and Azure Multi-Factor Authentication (AAD-02)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Conduct an assessment and planning workshop to gather requirements and information about the current environment, provide education on Azure Multi-Factor Authentication and Azure AD Conditional Access capabilities, and facilitate customer design decisions. * Design Azure AD Conditional Access policies based on customer requirements.   **Enable phase**   * Configure Azure Multi-Factor Authentication. * Implement Azure AD Conditional Access policies, initially scoped for test user accounts. * Enable and configure Azure AD Identity Protection. * Apply the Azure Multi-Factor Authentication and Azure Active Directory Conditional Access solution to users, optionally performed through a phased rollout. Microsoft will disengage after 1 week of a phased rollout, after which the customer will be responsible for completion. * Demonstrate Azure AD Identity Protection for the customer. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Participate in the assessment and planning workshop, communicate requirements, provide current environmental information, and make design decisions.   **Enable phase**   * Assist Microsoft, as necessary, during production implementation tasks. * Participate in solution validation testing. * Manage all end-user communication related to the rollout of the Azure Multi-Factor Authentication and Azure Active Directory Conditional Access solutions. * If deploying the solutions to users through a phased rollout more than 1 week in duration, complete the rollout to users after Microsoft disengages. * Participate in a demonstration of Azure AD Identity Protection. * Take ownership of the solution for ongoing management and support. |
| **Key assumptions** | None |
| **Project deliverables** Content for this project component will be included in these project deliverables | * Preparation checklist * Design and plan * Test cases * Delivery summary |

#### Exchange Online Enablement (EXO-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Conduct a planning workshop to gather requirements, information about the current environment, and customer design decisions for Exchange Online enablement (limited to 4 hours).   **Enable phase**   * Configure tenant-level settings for Exchange Online, excluding detailed policy design and configuration. * Configure internet mail flow or routing from a customer-provided relay. * Provide guidance related to SPF, DKIM, and DMARC configuration with Exchange Online. * Configure a customer Exchange connector for relay. * Configure the default Exchange ActiveSync policy. * Deploy an Exchange management server.   **Exchange Hybrid**   * If necessary, install and configure servers to be used for Exchange hybrid configuration. * If required by the customer, install and configure Exchange edge transport servers to be used for mail flow between the on-premises Exchange organization and Exchange Online. * Use the Exchange hybrid configuration wizard to establish the Exchange hybrid configuration.   **Migrate phase**  **Exchange Hybrid**   * Provide guidance related to preflight checks prior to pilot mailbox migrations. * Provide technical assistance during pilot mailbox migrations (limited to 4 weeks).   **Velocity Mailbox Migration Assistance**   * Assist the customer with reviewing and updating the mailbox migration schedule for pilot and velocity migrations. * Provide guidance related to preflight checks prior to velocity migrations. * Provide coordination with the FastTrack migration team during mailbox migrations. * Assist with the resolution of mailbox migration failures due to the on-premises messaging system. * Provide full-time support during pilot mailbox migration. * Provide full-time support during the velocity mailbox migration ramp, limited to the duration defined in the [General project scope](#_General_project_scope) section. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Participate in the planning workshop, communicate requirements, provide current environmental information, and make design decisions.   **Enable phase**   * Assist Microsoft, as necessary, during production implementation tasks. * Provide adequate administrative access to the on-premises Exchange environment and Office 365 tenant or run the required scripts and configuration commands when required.   **Migrate phase**  **Hybrid**   * Provide a list of specific mailboxes that are scheduled to be migrated during pilot migration events. * Provide technical leads who can assist with migration problem resolution during the pilot migration.   **Velocity Mailbox Migration Assistance**   * Provide a list of specific mailboxes that are scheduled to be migrated during velocity migration events. * Provide technical leads who can assist with migration problem resolution during velocity migration. * Prior to the start of migrations, review and accept the FastTrack Terms and Conditions for the FastTrack Data Migration Benefit. More information is available at: <http://aka.ms/fasttrackterms>. |
| **Key assumptions** | **Exchange Online Velocity Mailbox Migration**  The FastTrack Data Migration Benefit does not include weekend migrations.  The size of a migrated mailbox is limited to 85 percent of the user mailbox storage limit as defined in the Office 365 Service Descriptions.  Migrations are to be completed within FastTrack standard migration windows.  Office 365 ProPlus is installed and functional for all the users that form part of the migration. |
| **Project deliverables** Content for this project component will be included in these project deliverables | * Preparation checklist * Design and plan * Test cases * Delivery summary | |

#### Operations readiness planning—support and Service Desk enablement and monitoring (ITSM-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * Conduct up to 3 working sessions, up to 3 hours each, to identify Office 365 environmental dependencies and corresponding team ownership in the organization. * Create a service dependency map for Office 365 that includes Exchange Online. * Develop monitoring roles and responsibilities for Office 365. * Identify and document the monitoring approach and recommended interfaces for Office 365 monitoring. * Develop operating level agreements between the customer service desk and the monitoring team, including documented agreements related to alerting targets and response time agreements. * Review and discover the current incident management process. * Develop support or incident roles and responsibilities for Office 365. * Develop a new support process flow for Office 365, including integration with Microsoft Support. * Identify and document the escalation path and points of demarcation and interface between the current internal service desk and Microsoft Support. * Provide escalation triggers and recommended assignment workflows. * Develop a major incident management process flow for Office 365. * Provide guidance and recommendations related to continuous improvement and key performance indicators for supportability of Office 365. * Provide guidance identifying and documenting the recommended roles and responsibilities of engineers, administrators, and other operations staff when managing and administrating Office 365. * Identify and recommend process changes that will help the customer consume Office 365 issue alerting proactively for items that it need addressing. * Conduct knowledge transfer sessions for the customer service desk, (limited to 1 session on Office 365 support workflows and toolsets and a second session on the Office 365 monitoring plan and toolsets). |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**  Provide information related to current state processes and the operational model.  Make process and operational decisions.  Decision makers and operations and support subject matter specialists will fully participate in the workshops.  Attend the knowledge transfer session. |
| **Key assumptions** | * Participants will be prepared to engage in the workshops to provide insight, make decisions, and engage in discussions to support the completion of all areas in scope. * Full participation in the workshops by Customer decision makers, architects, and subject matter specialists is assumed. * Customer stakeholders should help with any escalations for decisions or participation in a timely manner. |
| **Project deliverables** Content for this project component will be included in these project deliverables | Not applicable |

#### Component deliverables: ITSM-01

Microsoft will produce the following additional deliverables for this project component.

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Service dependency map | An Office 365 service dependency map | No | Microsoft |
| Monitoring approach | * A listing of Office 365 monitoring roles and responsibilities * The monitoring approach and recommended interfaces for Office 365 monitoring | No | Microsoft |
| Support readiness plan | * A list of Office 365 support or incident roles and responsibilities * An escalation path and points of demarcation and interface between the current internal service desk and Microsoft Support | No | Microsoft |

#### Adoption and Change Management assistance (ACM-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Assess phase**   * The focus of the ACM engagement will be to:   + Assess people impact of the Exchange Online migration.   + Assess resistance to the Exchange Online migration. * Present the recommended ACM approach at the kickoff. * Document engagement activities determined in collaboration with the customer.   **Remediate phase**   * Perform the activities agreed on during the kickoff. * Create a Resistance Management Plan for the Exchange Online migration. * Track the status of project activities and adjust accordingly.   **Enable phase**   * Perform the activities agreed upon in the kickoff meeting and discussed in the progress review meeting. * Facilitate a virtual meeting or exchange of information (through email for example). * Document the project results and the recommended next steps. |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Assess phase**   * Attend and participate in the kickoff meeting. * Assign project initiation responsibilities to accountable customer leadership and establish target completion dates. * Staff the project with the required customer resources in the time frames that were agreed upon in the kickoff.   **Remediate phase**   * Attend the check in meeting. * Provide the resources and information needed to complete the project activities.   **Enable phase**   * Attend and participate in the closeout meeting. * Provide feedback on engagement activities. |
| **Key assumptions** | None |

#### Component deliverables: ACM-01

Microsoft will produce the following additional deliverables for this project component.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Phase | Acceptance required? | Responsibility |
| Project approach document | Documents the agreement reached between the team and the customer on the desired activities and key success factors of the engagement. | Assess | Yes | Microsoft |
| Resistance Management Plan | Documents the findings and recommended actions related to resistance towards the Exchange Online migration | Remediate | Yes | Microsoft |
| Closeout document | Documents the completed activities and recommended next steps for the customer’s ACM program. | Enable | Yes | Microsoft |

#### Communications Management assistance (COM-01)

| **Category** | **Description** | |
| --- | --- | --- |
| **Microsoft activities** The activities to be performed by Microsoft | **Enable and implement**  Based on the outcome of the Resistance management plan created in ACM-01 and the migration schedule, the Communication plan will be developed in conjunction with  The Communication plan will define initial communication to all users followed by targeted communication to the affected users in the different migration batches  The Communication plan will be based on existing communications platforms  Weekly progress reports of the planned milestones for communications vs the actual communications |
| **Customer activities ( and/or )** The activities to be performed by the Customer | **Enable and implement**   * Provide information and access to people, resources, and systems, and a work environment. * Participate in necessary workshops or meetings to gather required information. * Provide input into the communication plan * is responsible for implementing and sending the communication media and distribution * Adequate engagement time and space with stakeholders, management teams and relevant subject matter experts * Supply list of affected users 2 weeks before migration * Create and distribute all key communications based on the guidance provided in the Communications Plan * Feedback on the actual communications that was sent to the users * Manage resistance. |
| **Key assumptions** | No printed materials are included  Communication is limited to current communications platforms, e.g. email and intranet  to create all communications in the format required |

#### Component deliverables: COM-01

Microsoft will produce the following additional deliverables for this project component.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Phase | Acceptance required? | Responsibility |
| Communications Plan | Documents the key messaging to be distributed by specified senders to specified receivers, through the available communication mechanisms, and the timing thereof. | Remediate | Yes | Microsoft |

## Timeline

During project planning, a detailed timeline will be developed. All dates and durations are relative to the project start date and are estimates only.

## Deliverable acceptance process

During the project, Microsoft will submit certain deliverables (listed in the Approach section as deliverables with “Acceptance required?” equal to “Yes”) for the customer’s review and approval.

Within three business days of the date of submittal, the customer is required to:

* **Accept the deliverable** by signing, dating, and returning a service deliverable acceptance form, which can be sent by email, or by using (or partially using) the deliverable

Or

* **Reject the deliverable** by notifying Microsoft in writing; the customer must include a complete list of reasons for rejection.

Deliverables shall be deemed accepted unless the written rejection notification is received by Microsoft in the time frame specified.

If a rejection notification is received, Microsoft will correct problems with a deliverable that are in scope for the project (and documented in this SOW), after which the deliverable is deemed accepted.

Problems that are outside the scope of this SOW, and feedback provided after a deliverable has been accepted will be addressed as a change request, managed as described in the Change management process section.

## Project governance

The governance structure and processes the team will adhere to for the project are described in the following sections:

### Project communication

The following will be used to communicate during the project:

* **Communication plan**: This document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the customer as part of project planning.
* **Status reports**: The Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
* **Status meetings**: The Microsoft team will schedule regular status meetings to review the overall project status, the acceptance of deliverables, and review open problems and risks.

### Risk and issue management

The following general procedure will be used to manage active project issues and risks during the project:

* **Identify**: Identify and document project issues (current problems) and risks (potential problems that could affect the project).
* **Analyze and prioritize**: Assess the potential impact and determine the highest priority risks and problems that will be actively managed.
* **Plan and schedule**: Determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation.
* **Track and report**: Monitor and report the status of risks and problems.
* **Escalate**: Escalate to project sponsors the high impact problems and risks that the team is unable to resolve.
* **Control**: Review the effectiveness of risk and issue management actions.

Active issues and risks will be regularly monitored during the project.

### Change management process

During the project, either party is able to request modifications to the services described in this SOW. These changes only take effect when the proposed change is agreed upon by both parties. The change management process steps are:

* **The change is documented**: All change requests will be documented by Microsoft in a Microsoft change request form and submitted to the customer. The change request form includes:
  + A description of the change.
  + The estimated effect of implementing the change.
* **The change is submitted**: The change request form will be provided to the customer.
* **The change is accepted or rejected**: The customer has 3 business days to confirm the following to Microsoft:
  + Acceptance—the customer must sign and return change request form.
  + Rejection—if the customer does not want to proceed with the change or does not provide an approval within 3 business days, no changes will be performed.

### Executive steering committee

The executive steering committee provides overall senior management oversight and strategic direction for the project. The executive steering committee for the project will meet per the frequency defined in the communication plan and will include the roles listed in the following table. The responsibilities for the committee include:

* Making decisions about project strategic direction.
* Serving as a final arbiter of project issues.
* Approving significant change requests.

| Role | Organization | |
| --- | --- | --- |
| Project Sponsor | Customer |
| Project Manager | Customer | |
| Technical Lead | Customer | |
| Operational Manager | Customer | |
| Change Management Lead | Customer | |
| Account Delivery executive | Microsoft |
| Project Manager | Microsoft |
| Lead Architect | Microsoft | |
| Adoption & Change Management Lead | Microsoft | |
| Technical Account Manager (TAM) | Microsoft | |

### Escalation path

The Microsoft project manager will work closely with the customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The customer will provide reasonable access to the sponsor or sponsors in order to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

* Project team member (Microsoft or the customer)
* Project Manager (Microsoft and the customer)
* Microsoft Account Delivery Executive
* Microsoft Delivery Manager
* Microsoft and the customer project sponsor
* Executive steering committee

## Project completion

**Fixed fee**

The project will be considered complete when at least one of the following conditions is met:

* All Microsoft deliverables that require acceptance have been delivered and accepted (or deemed accepted).
* The Work Order has been terminated.

# Project organization

## Project roles and responsibilities

The key project roles and the responsibilities are as follows.

#### Customer

| Role | Component ID(s) | Responsibilities |
| --- | --- | --- |
| Project sponsor | All | Provide the estimated project commitment: part-time  Make key project decisions.  Serve as a point of escalation to support clearing project roadblocks. |
| Project Manager | All | Provide the estimated project commitment: part-time  Serve as primary point of contact for the Microsoft team.  Manage the overall project.  Deliver the project on schedule.  Take responsibility for customer resource allocation, risk management, and project priorities.  Communicate with executive stakeholders. |
| Client Infrastructure Lead | All | * Participate in workshop discussions and drive activities that address client configuration for online service consumption. * Help the Microsoft team complete the client infrastructure implementation activities. |
| Communications and Training Lead | All | * Take responsibility for customer communications related to the project. * Identify and plan for customer training requirements related to the project. |
| Active Directory and Identity Lead | AAD-01 | * Take responsibility for the on-premises AD DS forest (or forests). * Take responsibility for any on-premises identity provider that will be used for Azure Active Directory authentication. * Take responsibility for the Azure Active Directory integration solution going forward. |
| AAD-02 | * Provide requirements for the Multi-Factor Authentication and conditional access solution and make design decisions. * Responsible for Azure Active Directory. * Take responsibility for the Multi-Factor Authentication and conditional access solution going forward. |
| Messaging Lead | TPC-01, EXO-01, EXO-02 | * Take responsibility for the current messaging infrastructure and its integration with the Office 365 messaging environment on behalf of the customer. * Participate in workshop discussions and take responsibility for activities that address email readiness, including installation and implementation of messaging environment discovery tools, if necessary. |
| Network Lead | TPC-01 | Provide information about current network structures and datacenters.  Participate in workshop discussions and take responsibility for network-related activities, including network bandwidth requirements, network performance testing, and required updates to DNS or Dynamic Host Configuration Protocols, firewalls, and IP addresses. |
| NET-01 | * Build test workstations. * Install prerequisites. * Update proxies or firewalls. * Support data collection by the Microsoft consultant. * Attend meetings and workshops. |
| AUD-01 | * Participate in network workshops. * Implement necessary network changes, if required. |
| Operations Lead | All | Provide daily support that is related to ongoing system management and recovery.  Take responsibility for creating policies and operational models for the new architecture.  Create operational guides for the new environment. |
| Security Lead | TPC-01, AAD-02, EXO-01 | * Participate in workshop discussions and drives activities that address client configuration for online service consumption. * Assists the Microsoft team implement the security-related enablement activities. |
| Service Desk Lead | All | Take responsibility for problem resolution and first-level incident management when the system is in production. |
| Program Management Office (PMO) Leads | ACM-01 | * Attend the activities, sessions, workshops, or classes relevant to the PMO scope and help drive program change and adoption initiatives. * Take responsibility for the integration of change management and technical workstreams. |
| Change Managers | ACM-01 | * If the position exists, these managers are the people in the organization normally responsible for implementing change. * Attend activities, sessions, workshops, or classes that are relevant to the change management scope and help drive program change and adoption initiatives. * Be able to commit to 2 days of participation in workshops and meetings. |
| Business Unit Leaders | ACM-01 | * Will implement the transformation of the organization * Attend activities, sessions, workshops, or classes that are relevant to the business or relevant to the employees in their respective organizations. * Participate actively and visibly throughout the project. * Build a coalition of sponsorship with peers and managers. * Communicate effectively with employees and managers. |
| Training Lead | ACM-01 | * Take responsibility for technology training. * Attend activities, sessions, workshops, or classes relevant to his or her scope of influence and help drive program communication and training initiatives |
| Human Resources Lead | ACM-01 | The resource in this role will be empowered to assist with the program from a personnel perspective and can provide input on the potential effects of the technology change such as organizational effects, fears of job loss, or swings in morale. |

#### Microsoft

| Role | Component ID(s) | Responsibilities |
| --- | --- | --- |
| Microsoft Delivery Manager | All | Manage and coordinate the overall Microsoft project.  Serve as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.  Facilitate project governance activities and lead the executive steering committee. |
| Microsoft Project Manager | All | Manage and coordinate Microsoft project delivery  Take responsibility for issue and risk management, change management, project priorities, status communications, and status meetings.  Coordinate Microsoft and Microsoft subcontractor resources but not customer resources. |
| Microsoft Lead Architect | All | Design the overall solution.  Provide guidance based on Microsoft-recommended practices. |
| Microsoft and Partner Consultant (or Consultants) | All | Deliver assessment and planning workshops  Produce project deliverables  Provide technical assistance during the completion of customer preparation tasks  Act as primary technical subject matter expert from Microsoft during the project  Complete in-scope implementation and migration activities |
| Microsoft FastTrack Manager | Not applicable | Serve as primary point of contact for FastTrack activities  Remotely participate in the project kickoff  Contribute to project management plans, project status reports, and project performance reports  Take responsibility for FastTrack resource allocation, risk management, and project priorities |
| Microsoft FastTrack Engineer | Not applicable | Provide remote technical guidance regarding Office 365 remediation and service implementation activities that are provided by FastTrack  Assess migration readiness and participate in planning workshops |
| IT Service Management (ITSM) Architect | ITSM-01 | Provide operations oversight for the overall Office 365 monitoring and support planning  Provide subject matter expertise for operations and support that are related to the Office 365 deployment |
| ITSM Consultant | ITSM-01 | Conduct workshops and discussions on in-scope operations readiness topics  Take responsibility for preparing the service map, and the monitoring and support plan documents |
| Microsoft ACM Consultant | ACM-01 | Manage Microsoft ACM project delivery  Take responsibility for Microsoft ACM resource allocation, risk management, project priorities, and communication with executive management  Verify that deliverable development and activities are completed according to the plan  Provide ACM thought leadership  Deliver ACM sessions, workshops, classes, work products, and deliverables |

# Customer responsibilities and project assumptions

## Customer responsibilities

In addition to the customer activities defined in the Approach section, the customer is also required to:

* Provide information.
  + This includes accurate, timely (within 3 business days or as mutually agreed-upon), and complete information.
* Provide access to people and resources.
  + This includes access to knowledgeable customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
* Provide access to systems.
  + This includes access to all necessary customer work locations, networks, systems, and applications (remote and onsite).
* Provide a work environment.
  + This consists of suitable work spaces, including desks, chairs, and Internet access.
* Manage non-Microsoft resources.
  + The customer will assume responsibility for the management of all customer personnel and vendors who are not managed by Microsoft.
* Manage external dependencies.
  + The customer will facilitate any interactions with related projects or programs in order to manage external project dependencies.

## Project assumptions

The project scope, Services, fees, timeline, and our detailed solution are based on the information provided by the customer to date *(as per tasking letter sent 16 October 2019).* During the project, the information and assumptions in this SOW will be validated, and if a material difference is present, this could result in Microsoft initiating a change request to cover additional work or extend the project duration. In addition, the following assumptions have been made:

* Work day:
  + The standard work day for the Microsoft project team is between 8 AM and 5 PM local time, Monday through Friday.
* Standard holidays:
  + Observance of consultants’ country-of-residence holidays is assumed and has been factored into the project timeline.
* Remote working:
  + The Microsoft project team may perform Services remotely.
* Language:
  + All project communications and documentation will be in English. Local language support and translations will be provided by the customer.
* Staffing:
  + If necessary, Microsoft will make staffing changes. These can include, but are not limited to, the number of resources, individuals, and project roles.
* Informal knowledge transfer:
  + Customer staff members who work alongside Microsoft staff will be provided with information knowledge transfer throughout the project. No formal training materials will be developed or delivered as part of this informal knowledge transfer.

# Mimecast Transition

department of e-Government is responsible as the overall owner of the archived data to coordinate

the retrieval of its archived data from the current service provider.

Due to the size of the archive and the cost that will be associated with ingestion at this size. Microsoft

recommends the following considerations and the price to be provided will be based on the selected

approach:

Archive size as confirmed by Mimecast on **31 October 2019**: 191 TB **(See Addendum B)**

**Option 1:**

can keep the archive at Mimecast until the retention period expires depending on data retention regulations/policies at . Microsoft can deploy the Mimecast Outlook Add-On to all the mailbox users to enable them to access the archive.

**Option 2:**

to facilitate the availability of the archived data to Microsoft using a databox and/or secure

specialised device. Once the data is made available to Microsoft, the ingestion project will be initiated,

and Microsoft will upload the data to the cloud. The cost associated with this option are significant due

to the size of the archive.