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Statement of Work

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Design and Implementation of Workday Integration with Azure Active Directory

Prepared for

Prepared by

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Introduction

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.

has adopted Microsoft Azure Active Directory (AAD) as the central directory and authentication repository for cloud-based applications. The current infrastructure has established hybrid identity between their on-premises Active Directory and Azure Active Directory under a Single-Forest / Single Tenant topology. is planning to integrate the Workday HR system with the on-premises Active Directory and Azure AD for automatic user account provisioning, as well as single sign-on (SSO) integration with Azure AD. The ultimate goal of this initiative is to leverage the Microsoft Azure AD user provisioning service to enable automation for the following human resources and identity lifecycle management scenarios:

* **Hiring new employees** - When a new employee is added to Workday, a user account is automatically created in Active Directory, Azure Active Directory, with write-back of the email address to Workday.
* **Employee attribute and profile updates** - When an employee record is updated in Workday (Full name, title, and/or line manager), their user account will be automatically updated in Active Directory and Azure Active Directory.
* **Employee terminations** - When an employee is terminated in Workday, their user account is automatically disabled in Active Directory and Azure Active Directory.
* **Employee rehires** - When an employee is rehired in Workday, their old account can be automatically reactivated or re-provisioned (depending on your preference) to Active Directory and Azure Active Directory.

In addition, Group users can sign-on to Workday using the Azure AD as the authentication provider with Single Sign-on (SSO) capability.

# Project objectives and scope

## Objectives

The objective of this project is to design and implement the Workday integration with your on-premises Active Directory Domain Services (AD DS) and Azure Active Directory under a single forest AD environment using the Azure AD user provisioning service.

This project will establish integration between your Workday tenant and your on-premises AD DS and Azure AD infrastructure to support automatic provisioning, attributes update and de-provisioning of user account that triggered by Workday. Also, single sign-on (SSO) integration with Workday will be implemented to allow users to sign-on to Workday using their Azure AD identity.

The purpose of this SOW is to provide you with the scope, activities, and timeline necessary to complete this activity.

## Areas in scope

### General project scope

Microsoft will provide Services in support of the following scope.

| Area | Description | Assumptions |
| --- | --- | --- |
| Azure AD User Provisioning Service for Workday | Design and Implement Azure AD User Provisioning Service for Workday with one (1) single Workday Tenant, one (1) Active Directory Domain Services (AD DS) forest, and one (1) single Azure AD Tenant. Microsoft will deliver the following to achieve this:  Plan and design the solution architecture for Azure AD user provisioning integration with Workday  Conduct Proof of Concept (PoC) to validate the solution under AD DS and Azure AD environment and identify constraints and limitations  Setup and configure Azure AD User Provisioning Services App for Workday (up to 4 provisioning apps for 4 AD DS domains under Single AD Forest)  Deploy Azure AD Connect Provisioning Agents (up to 3 agents under Single AD Forest)  Reconfigure the existing Azure Active Directory Connect to support pulling updates from on-premises AD DS to Azure AD  Configure attribute mappings between Workday and Active Directory (up to 20 attributes per provisioning app)  Configure Workday Writeback to update email addresses back to Workday from Azure AD | Customer will implement the configuration changes as recommended by Microsoft/Workday that is required to support the implementation of Azure AD user provisioning services integration with Workday integration  Customer will collaborate with Workday consultant to implement the configurations of the Workday system that is required for the integration with Azure AD user provisioning services in both PoC and Production environment  Customer will provide the necessary resources such as Virtual Machines (VMs) either on-premises VMs or Azure cloud VMs which is required for the setup of Azure AD Connect Provisioning Agents. |
| Azure AD Single Sign-on (SSO) integration with Workday | Design and Implement Workday Single Sign-on (SSO) with one (1) Azure AD Tenant, by using the Workday app from the Azure AD gallery.  Plan and design the solution architecture for Workday single sign-on integration with Azure AD  Conduct PoC to validate the solution under Azure AD environment and identify constraints and limitations  Configure single sign-on integration with Workday from the Azure AD app gallery | Customer will collaborate with Workday consultant to implement the configurations on the Workday system that required for the Single Sign-on (SSO) integration with Azure AD in both PoC and Production environment. |

### Software products and technologies

The products and technology that are listed in the following table are required for the project. The Customer is responsible for obtaining all identified licenses and products.

| Product and technology item | Version | Ready by |
| --- | --- | --- |
| Windows Server Active Directory Domain Services (AD DS) | 2012–2019 | Start of the project |
| Azure Active Directory | Basic or Premium | Start of the project |
| Microsoft Azure Active Directory Connect (AADC) | 1.3.21.0 or above | Start of the project |
| Microsoft Azure Active Directory Connect Provisioning Agent | 1.1.30.0 or above | Start of the project |

### Data migration

Data migration is not in scope for this SOW.

### System integration

The following system integration is in scope for the project.

| Integration | Description of scope | Responsibility | | Ready by |
| --- | --- | --- | --- | --- |
| Workday | Workday will be integrated with Azure Active Directory and Active Directory Domain Services for automatic user provisioning and single sign-on. | Microsoft with Customer support | Start of the Enable phase | |
| Azure AD User Provisioning Service | Azure AD User Provisioning Service will be integrated with on-premises Active Directory Domain Services, Azure AD, Azure AD Connect and Workday to enable automatic user provisioning. | Microsoft with Customer support | Start of the Enable phase | |

### Environments

The following environments will be required to deliver the project.

| Environment | Location | Responsibility | Ready by |
| --- | --- | --- | --- |
| Test (PoC) | Azure | Customer | Start of Remediate phase |
| Production | Customer/Azure | Customer | Start of Remediate phase |

### Testing and defect remediation

#### Testing

The following testing is included in the scope of the project. If additional time is needed for Microsoft testing support, then it can be requested through the Change management process described in this SOW.

| Test type (environment) | Description | Responsibility | | |
| --- | --- | --- | --- | --- |
| Has responsibility  for testing? | Provides data or test cases | Provides guidance and support |
| PoC testing (non-production) | Test cases will be run in the non-production environment to identify the constraints and limitations of the solution. | Microsoft | Customer | Customer |
| Validate testing (production) | Test cases will be run in the production environment to validate that the implemented solution is functioning as designed. | Customer | Customer | Microsoft |

#### 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.

| Area | Description |
| --- | --- |
| Azure AD User Provisioning Service | Implementation of identity life-cycle management and attribute flows that are not available out-of-the-box is out of scope.  Implementation of automatic Active Directory group assignment is out of scope.  Write-back of attributes other than email addresses to Workday from Azure AD is out of scope.  Customizing Workday user attributes is out of scope. Microsoft will only implement attribute mappings from the default list that can be selected from the user provisioning app in the app gallery.  User provisioning for pure Azure AD user account (i.e. user without on-premises AD DS account) is out of scope.  The delivery of the temporary password assigned to the user’s AD account is recommended to leverage the Azure AD Self-Service Password Reset (SSPR) premium feature. However, the implementation and enablement of SSPR is out of scope.  Customer is responsible for the implementation of the temporary password delivery mechanism, regardless it will be using SSRP or any other alternative approach. |
| Authentication types for applications published through Azure Active Directory App Gallery | Linked sign-on is out of scope. |
| AD FS | Workday Single Sign-on (SSO) integration with AD FS through SAML 2.0 is out of scope. |
| 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. |
| Integration with third-party software | Microsoft will not be responsible for integration with third-party software (except Workday integration which will collaborate with Customer and Workday consultant for the implementation). |
| Data migration | Data migration activities are not in scope for this project. |
| Product bugs  and upgrades | Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project. |
| 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 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. |

# Project approach, timeline, and deliverable acceptance

## Approach

The project will be structured following the Microsoft Online Services Lifecycle methodology across three of the possible four distinct phases: Assess, Remediate, Enable, and Migrate (Migrate is not included in this SOW). Each phase has distinct activities and deliverables that are described in the following sections.

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. |

### Assess

During the Assess phase, Microsoft will conduct a series of workshops to gather design requirements. Microsoft and the Customer will review the results of the planning workshops and jointly determine requirements necessary to support the deployments.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | * Conduct an envisioning workshop (up to 4 hours) and requirements gathering. * Facilitate a discussion workshop and decision for the target state solution of automatic user provisioning and single sign-on for Workday. * Conduct readiness check on infrastructure such as Azure AD, AD FS, and Azure AD Connect for the deployment of SSO solution, and Azure AD User Provisioning Services with Workday integration |
| **Customer activities** The activities to be performed by the Customer | * Provide information of the current infrastructure setup during the envisioning workshop. * Collaborate with Workday to provide the detailed design and information that is required to facilitate the design discussion. * Confirm decision on the integration approach with Workday. |
| **Key assumptions** | * Workday will provide the requirements and detail specifications for the integration between Workday and on-premises Active Directory Domain Services at the start of the Assess phase. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Preparation checklist | An Excel spreadsheet that documents the tasks that must be completed by the Customer and the resources that must be procured to facilitate the completion of in-scope work. | No | Microsoft |

### Remediate

During the Remediate phase, the Customer uses the preparation checklist to remediate the current issues and prepare the environment for onboarding the Workday integration with AD DS / Azure AD. This preparation includes completion of prerequisites, procurement, and provisioning of required hardware or virtual machines, cleanup of AD DS content, and the deployment of Azure Active Directory Provisioning Agents and related integration component requirements. These preparations are based on decisions made during the Assess phase of the project.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | * Assist with identified remediation activities following the workshop. * Plan and design the solution architecture for automatic user provisioning and single sign-on integration with Workday and Azure AD * Prepare the preliminary design and plan for Workday integration. * Conduct up to 3 days Proof-of-Concept (PoC) for Azure AD User Provisioning Services with Workday integration, and SSO integration with Azure AD on selected testing email domain. * Finalize Design and Plan according to PoC results |
| **Customer activities** The activities to be performed by the Customer | * Implement configuration changes as recommended by Microsoft / Workday that required to support the implementation of user provisioning and SSO with Workday integration. * Review and confirm on the architecture design. * Collaborate with Workday consultant to implement the configurations on the Workday system to support the PoC within 2 weeks period. |
| **Key assumptions** | * Items in the preparation checklist can be remediated within 2 weeks. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Design and plan | A Word document (up to 25 pages) that captures design decisions made during the workshop, documents the design for the solution, and details the high-level plan for the completion of in-scope work. | Yes | Microsoft | |
| PoC Test Cases | An Excel spreadsheet that documents the test cases to be performed during the PoC testing to validate that the implementation solution functions as designed. Customer will work with Microsoft to complete the test cases and document the result in the spreadsheet. | No | Microsoft | |

### Enable

During the Enable phase, Azure Active Directory User Provisioning Service and corresponding components will be installed in the production environment and components will be tested to validate expected functionality. After validation, Microsoft will perform a final demonstration of functionality. An engagement closeout meeting completes the project.

|  | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | * Setup and configure Azure AD User Provisioning Services App for Workday (up to 4 AD DS domains under Single AD Forest) * Deploy Azure AD Connect Provisioning Agents (up to 3 agents under Single AD Forest) * Reconfigure existing Azure Active Directory Connect to support pulling updates from on-premises AD DS to Azure AD * Configure attribute mappings between Workday and Active Directory (up to 20 attributes per provisioning app) * Configure Workday Writeback to update email addresses back to Workday from Azure AD * Configure single sign-on integration with Workday from the Azure AD app gallery * Provide assistance to for pilot and mass user rollout (Timeboxed to 40 hours) * Develop Administration and Operation Guide * Conduct knowledge transfer (up to 4 hours session) |
| **Customer activities** The activities to be performed by the Customer | * Collaborate with Workday consultant to implement the configurations on the Workday system that required for the integration with user provisioning service and single sign-on with Azure AD within 2 weeks period.. |
| **Key assumptions** | The mass user rollout to the 4 AD DS domain can be completed within 2 weeks after the solution is deployed and go live in production.  Customer is responsible to edit all necessary firewall rules as recommended by Microsoft that required for the solution implementation, while the turnaround time for the implementation should be less than 1 week. |

#### Deliverables

| Name | Description | Acceptance required? | Responsibility |
| --- | --- | --- | --- |
| Administration and Operation Guide | A Work document (up to 15 pages) that detailed the administration and operation instructions that required to support the solution deployed. | No | 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 timeframe 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 three 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 three business days, no changes will be performed.

During the project, either party can request, in writing, additions, deletions, or modifications to the Services described in this SOW (“change”). Approved changes will be managed through amendments and could lead to additional costs and schedule impacts. We shall have no obligation to commence work in connection with any change until the details of the change are agreed upon in an amendment signed by the authorized signatories from both parties.

Within three consecutive business days of receipt of the proposed amendment, you must either indicate acceptance of the proposed change by signing the amendment or advise us not to perform the change. If you advise us not to perform the change, we will proceed with the original agreed-upon Services only. In the absence of your acceptance or rejection within the previously noted time frame, we will not perform the proposed change.

### 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 delivery manager
* Microsoft and the Customer project sponsor

## Project completion

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 | Responsibilities |
| --- | --- |
| Project sponsor | * Provide the estimated project commitment: 2–4 hours a week * Make key project decisions. * Serve as a point of escalation to support clearing project roadblocks. |
| Project manager | Provide the estimated project commitment: 20 hours a week  Serve as primary point of contact for the Microsoft team.  Manage the overall project.  Deliver the project on schedule.  Responsible for Customer and 3rd party partner resource allocation, risk management, and project priorities.  Communicate with executive stakeholders. |
| Active Directory lead and identity lead (or leads) | Take responsibility for Azure Active Directory and on-premises AD DS forest (or forests) that required integration with Workday.  Take responsibility for the Azure AD User Provisioning Service and Single Sign-on (SSO) solution going forward. |

|  |  |
| --- | --- |
| Security lead (or leads) | * Provide security requirements for the solution. * Optionally, participate in solution validation testing. |
| User communication lead (or leads) | * Take responsibility for user communications related to the Single Sign-on solution to Workday. |

#### Microsoft

| Role | Responsibilities |
| --- | --- |
| Delivery manager | Manage and coordinate the overall Microsoft project.  Serve as a single point of contact for escalations, billing issues, personnel matters, and contract extensions. |
| Microsoft project manager | 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 | Design the overall solution.  Provide guidance based on Microsoft-recommended practices. |
| Microsoft consultant | Lead workshop and produces document deliverables.  Provide technical support during Customer-led completion of preparation tasks.  Complete all in-scope implementation work. |

# Customer responsibilities and project assumptions

## Customer responsibilities

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

* Provide information:
  + This includes accurate, timely (within three 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. 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, 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.
  + If the Microsoft project team is required to be present at the Customer location on a weekly basis, resources will typically be on site for three nights and four days, arriving on a Monday and leaving on a Thursday.
* 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.