

# Microsoft Services

## G-Cloud Services Definition Document

Prepared for

**G-Cloud**

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**Version 1.0**

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## Table of Contents

Introduction .....	3
1 Microsoft Premier Deployment (MPD).....	4
2 Bespoke Microsoft Cloud Services for Azure .....	30
3 Bespoke Microsoft Cloud Services for Dynamics CRM Online.....	31
5 Bespoke Microsoft Cloud Services for Lync Online .....	33

# Introduction

## About Microsoft Services

Microsoft Services deliver leading-edge technical consulting and support to help customers gain maximum value from their investment in Microsoft technology. Key benefits of a direct relationship with Microsoft Services for Cloud-based projects include:

- **World Class Expertise:** With significant experience of delivering mission-critical environments on the Microsoft platform, Microsoft reduces the risk of successful delivery.
- **Distinctive Intellectual Property (IP):** Microsoft is able to draw upon unique IP garnered from many worldwide deployments to accelerate delivery.
- **Long-Term Customer Relationships:** committed to long-term customer success.
- **Connection with Microsoft Product Groups:** At any stage of the design or implementation process, Microsoft is able to connect with the specific Product Groups to resolve issues and assist in planning and strategy.
- **A Relentless Focus on Driving Customer Impact:** through architecture, deployment, adoption and support, ensuring our customers use and get value from their investments in Microsoft.
- **Proven Practice:** Ensuring all solutions are developed incorporating Microsoft proven practices.

## Overview of Services Description

Microsoft Services provides a range of professional services relating to the provision of Public, Private and Hybrid Cloud environments. This document relates to the G-Cloud Catalogue and provides descriptions on the following services offerings:

- Microsoft Premier Deployment
- Bespoke Microsoft Cloud Services for Azure
- Bespoke Microsoft Cloud Services for Dynamics CRM Online
- Bespoke Microsoft Cloud Services for SharePoint Online
- Bespoke Microsoft Cloud Services for Lync Online
- Bespoke Microsoft Cloud Services for Exchange Online
- Bespoke Microsoft Cloud Services for Hyper-V Cloud
- Bespoke Microsoft Cloud Services for the Office 365 Suite

# 1 Microsoft Premier Deployment (MPD)

## 1.1 Introduction to the MPD Office 365 Service Description

### 1.1.1 Background

The Microsoft® Services Office 365 Service description is intended to provide an outline of the Microsoft Premier Deployment (MPD) program lead deployments. Items outlined in this service description focus on the Plan/Prepare and Provision/Migrate deployment motions as defined in the Online Solution Lifecycle provided in the figure below.

### 1.1.2 Microsoft Premier Deployment (MPD) and Microsoft Consulting Services (MCS)

The MPD service focuses on infrastructure preparedness and mailbox migrations to Office 365. Microsoft Consulting Services (MCS) is the vehicle for delivering the MPD service offering for all customers but typically those customers who have greater than 2,400 seats. *Please note that the use of Premier in MPD should not be confused with traditional Premier Services that are also available from Microsoft.*

#### 1.1.2.1 MPD Overview

The MPD service includes preparation for Office 365 identity federation, messaging coexistence, messaging data migration (mail, calendar, contacts), and on-site and off-site deployment consultants as required.

The MPD program was created with one goal in mind: *to enable an accelerated, efficient, high-quality and predictable adoption of Office 365.*

The MPD program services do not include migrating applications to Microsoft SharePoint® Online, custom development, client software deployment, or change management. The MPD service requires the customer complete a number of basic checks and any required remediation steps to allow the MPD service to complete mailbox migrations within the nominated time scales.

### 1.1.3 Engagement Process Flow

The Office 365 Service Deployment Offering is designed to be delivered across two phases: **Plan/Prepare** and **Provision/Migrate**. These phases makeup the Onboarding focus in the Online Solutions Lifecycle (OSL).

Figure 1 below illustrates the sequence of the Onboarding process. The Plan/Prepare and Provision/Migrate phases are the motions represented by this Offering.

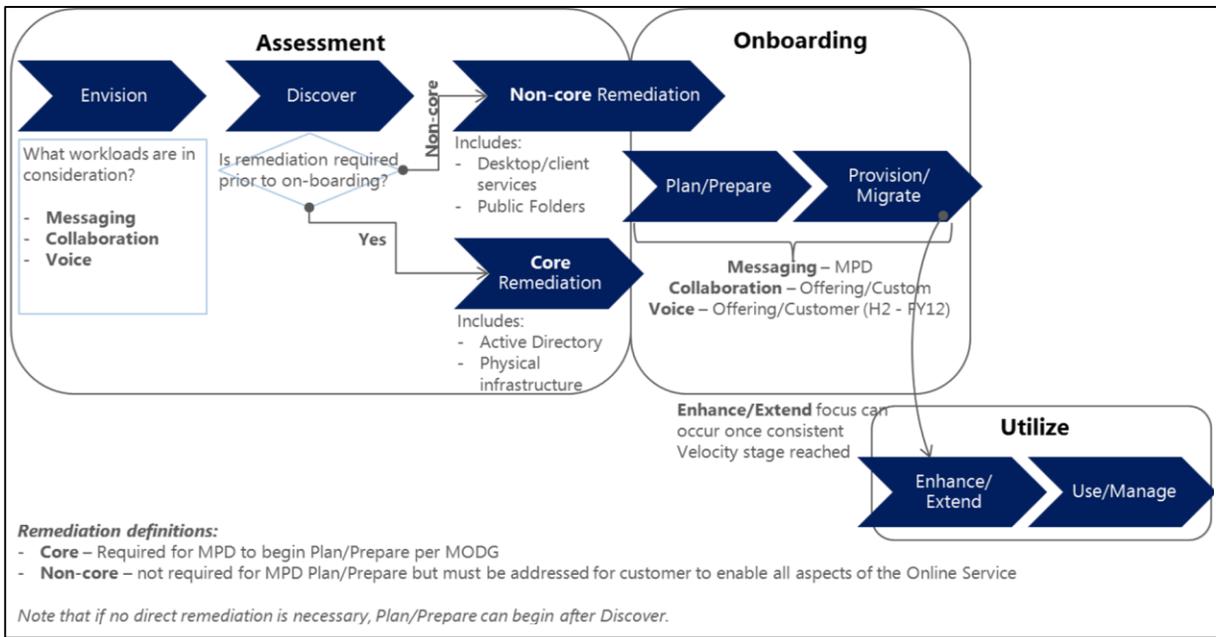


Figure 1 - Online Solutions Lifecycle Prescribed Sequence

### 1.1.4 Engagement Process Flow

For an Office 365 on-boarding engagement, Figure 2 below provides a high-level project timeline view.

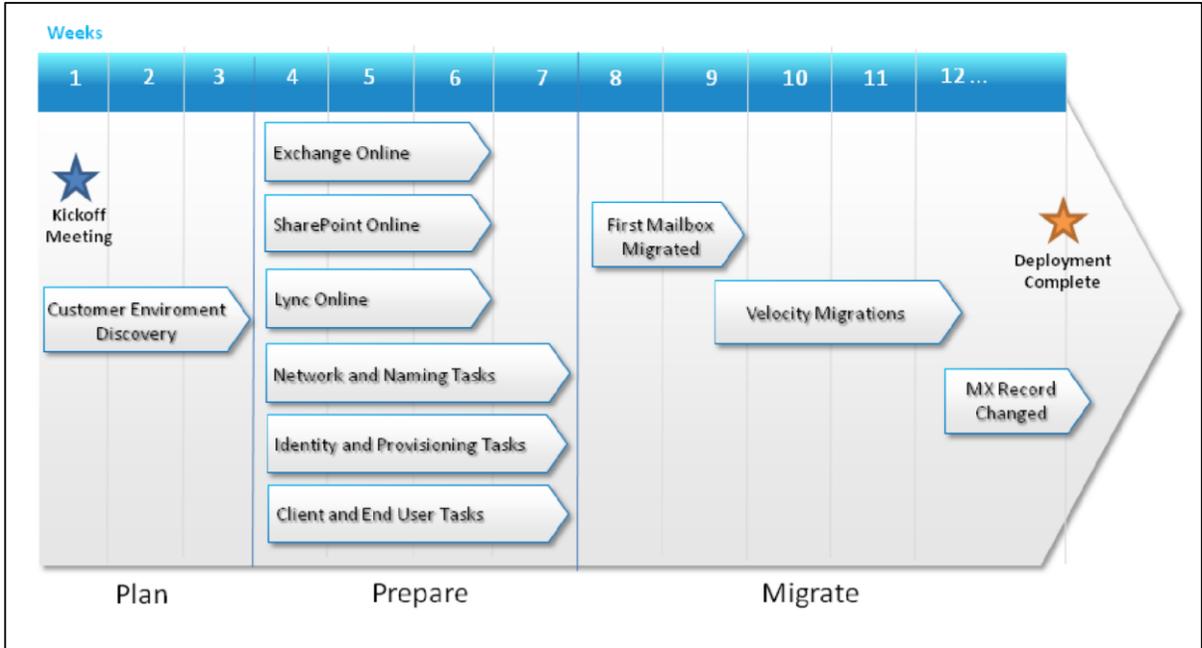


Figure 2 - Project Timeline View

## 1.2 Office 365 Service Deployment Offering Structure

The MPD service will typically be employed after two activities have been carried out with the customer to ensure that the Office 365 service fits with the customer requirements and to discover any remediation work required on the customer's environment prior to any migration work.

The two activities are:

- **Solution Alignment Workshop (SAW).** Carried out by Microsoft with the customer and kicks off with an overview of the Office 365 service. This is followed by a detailed set of questions that the customer answers to provide a view on the suitability of the customer infrastructure to be able to utilize cloud-based services.
- **Migration Due Diligence (MDD).** A documented report produced after the SAW (above) which describes any issues with the customer infrastructure and provides a list of any required remediation steps the customer would need to complete before moving to cloud-based services.

### 1.2.1 Approach

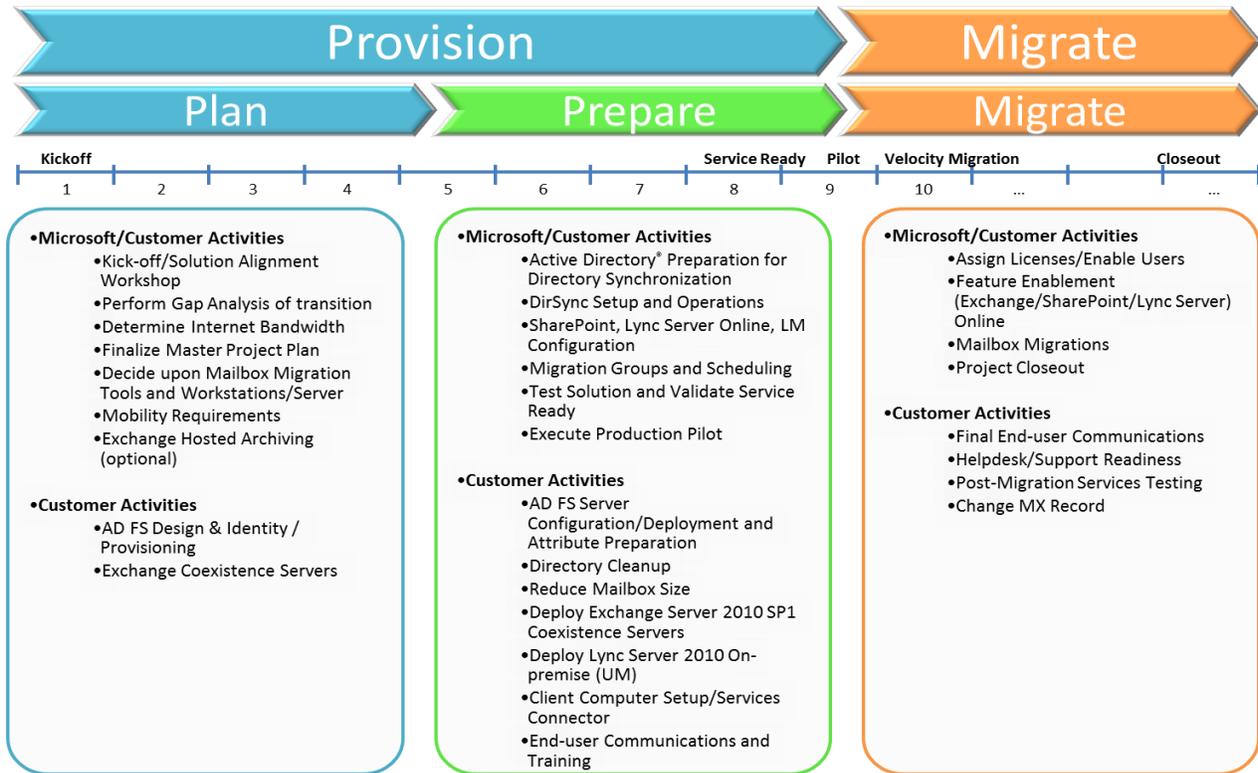
The engagement is delivered in three distinct phases:

- **Plan**
- **Prepare**
- **Migrate**

The execution of the Plan and Prepare phases results in the selected Office 365 services (e.g., Exchange Online, SharePoint Online, Lync Online) being provisioned for the customer. The goal of Service Provisioning is to enable users to consume these services.

Service Provisioning can occur without email data migration if the customer has not selected Exchange Online or is not migrating email data. Service provisioning can also occur with email data migration as described in the Migrate phase below.

The three phases organize the activities that control the execution of the project while keeping individual tasks serialized. It is common for tasks outlined in the Plan phase and Prepare phase to occur simultaneously and for tasks in the Prepare phase and Migrate phase to overlap. A conceptual overview of the phases is depicted below in Figure 3:



**Figure 3 - Conceptual Approach**

### 1.3 Plan Phase Overview

During the Plan phase, the combined team works together to align the project’s technical requirements, goals, critical success factors, plans, and constraints. Prior to kicking off the project, the Microsoft Engagement Manager consults with the Customer Sponsor and Project Manager to schedule the kickoff, outline project team members, review findings from the Migration Due Diligence (MDD), and understand mutual governance considerations in order to make the kickoff a successful meeting for initiating the project. In addition, the Microsoft team gathers information from the MDD, Solution Alignment Workshop (SAW), and other provided documentation from the customer.

The team kicks off the project with a meeting of the entire team to manage expectations on the project team’s focus, customer vision and project objectives. In addition, the team establishes expectations on team roles and responsibilities and reviews a sample project plan.

Following the kickoff, the Microsoft Consultant begins the technical discovery with customer subject matter experts (SMEs) with the objective to gather and document the existing on premise infrastructure data. Microsoft and the customer will run jointly the Office 365 Deployment Readiness Tool and the Exchange Server Deployment Assistant Wizard.

The Microsoft Project Manager assists the Customer Project Manager with planning the project and elaborating the project plan. The plan will provide the high-level integrated view and the detailed work stream view and clearly identifies key Microsoft and customer milestones and dependencies.

The Plan phase ends when discovery and initial project planning are complete. This milestone represents that Microsoft and the Customer agree on the project direction and the activities necessary to prepare for the selected Office 365 services. Upon conclusion of the Plan phase, the project plan is baselined. The plan defines both Microsoft and customer roles and resources. The plan also establishes the project schedule.

### 1.3.1 Plan Phase Entrance Criteria

The entrance criteria (prerequisites) for the Plan phase are listed in Table 1 below. The Customer is expected to manage these criteria to ensure it is met prior to the project kickoff meeting.

Entrance Criteria ID	Description
ENC101	Microsoft has performed a Migration Due Diligence (MDD) and reviewed results with customer. Customer approves the MDD report.
ENC102	Customer has reviewed the Office 365 Service Descriptions.
ENC103	Customer must have completed or planned for completion all preparation and remediation tasks identified from the MDD report.
ENC104	Customer has assigned a qualified project manager to plan and lead the project.
ENC105	Customer understands any hardware or software required for the project.
ENC106	Customer provides requested existing technical and environment documentation two weeks prior to kickoff. Examples of requests include documentation for Active Directory forest structure and application dependencies.
ENC107	Customer runs the Office 365 Deployment Readiness Tool on a properly configured workstation.

**Table 1 - Plan Phase Criteria**

### 1.3.2 Microsoft Responsibilities

Microsoft has the following Plan Phase responsibilities as described in Table 2 below:

Activity	Covering	Count (# of times performed)
Workshop	Project Kick-off	1 – Single

Activity	Covering	Count (# of times performed)
	<ul style="list-style-type: none"> <li>• A high-level review of customer solution alignment with published Office 365 feature set and service capabilities</li> <li>• Outline project governance that includes plans for stakeholder management, communications management, scope/change management, and issue/risk management</li> <li>• Create risk and issue tracking for use by Microsoft and Customer during the project</li> <li>• Outline the Conditions of Satisfaction (COS) mutually agreed upon criteria for a successful project</li> </ul>	Program Kick-off
<b>Customer Environment Discovery</b>	Provide assistance in running the Exchange Server Deployment Assistant Wizard.	1

<p><b>Discovery Workshop(s)</b></p>	<p><b>Review and discuss plans, documents and findings for each of the following services and verify that required preparation and remediation was considered prior to creation of the project plan.</b></p> <p><b>Exchange Online:</b></p> <ul style="list-style-type: none"> <li>• Email Coexistence</li> <li>• Email Migration</li> <li>• Certificates</li> <li>• Bandwidth</li> <li>• Public Folders</li> <li>• Email Client Software</li> <li>• Mobile Devices</li> <li>• Mail-Enabled Applications</li> <li>• Service Limits</li> <li>• Exchange Online Administration</li> <li>• Application Interoperability</li> <li>• Security</li> <li>• Unified Messaging Services</li> <li>• Contacts and Distribution Groups</li> <li>• Calendar Sharing</li> </ul> <p><b>SharePoint Online</b></p> <ul style="list-style-type: none"> <li>• Feature Usage</li> </ul>	<p>Up to 10</p>
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Activity	Covering	Count (# of times performed)
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- Performance Guidelines **Lync Online**
- Feature Usage
- Domain Federation
- Coexistence
- Client Requirements and Limitations

**Review and discuss plans, documents and findings for each of the following areas and verify that required preparation and remediation was considered prior to creation of the project plan.**

- **Network and Naming Services including:**

- Domain Re-delegation
- External DNS Records
- Third-Party SSL Certificates
- Ports and Protocols
- Firewall Considerations
- WAN Accelerators
- Hardware and Software Load Balancing
- Internet Bandwidth
- TCP Port Availability

- **User Identity and Account Provisioning including:**

- Adding and provisioning user accounts
- User License Activation
- Active Directory Synchronization
- Single Sign-on
- Directory Synchronization Tool

- **Client and End-User Experience** ○ Rich Experience Clients ○ Web Experience Clients ○ Web Conferencing ○ Extended Protection for Authentication

Activity	Covering	Count (# of times performed)
	<ul style="list-style-type: none"> <li>○ Mobile Devices</li> <li>□ <b>User Education and Communications</b></li> </ul>	
<b>Project Plan</b>	<b>Provide project plan template in .MPP format and assist Customer Project Manager with customizing and finalizing project plan baseline.</b>	1
<b>Status Meeting</b>	<b>Participate in weekly status meetings.</b>	Per week
<b>Status Reports</b>	<b>Document and provide weekly status</b>	Per week
<b>Checkpoint</b>	<b>Schedule and conduct Plan Phase Checkpoint</b>	1

**Table 2 - Plan Phase Microsoft Responsibilities**

### 1.3.3 Customer Responsibilities

Customer has the following Plan Phase responsibilities as described in Table 3 below:

Activity	Description
<b>Scheduling and Communications</b>	Engagement and scheduling of customer subject matter experts and business representatives to participate in the kick-off, requirements, and planning sessions as identified in the Project Schedule.
<b>Conditions of Satisfaction</b>	Participate in and agree to Conditions of Satisfaction (COS) for the project.
<b>Discovery Workshop(s)</b>	Coordinate scheduling and subject matter expert participation in all technical planning and discovery meetings.

<b>Customer Environment Discovery</b>	Run Exchange Server Deployment Assistant Wizard.
<b>Project Planning</b>	Finalize the project plan and schedule. Your deployment project plan is used to schedule, track and manage Office 365 deployment work stream
<b>Activity</b>	<b>Description</b>
	progress. The plan should include a migration schedule that shows when migration groups (inclusive of user, resource and shared mailboxes will be migrated to Office 365.
<b>Obtain Hardware</b>	Procure the necessary hardware for on premises components of Office 365. Examples of potential hardware include servers for Active Directory Federation Services (AD FS), Directory Synchronization Tool (DirSync) and coexistence, clients for testing and any other required hardware. This must occur prior to completing the Plan phase.
<b>Evaluate Network</b>	Ensure your on premises network meets bandwidth requirements outlined in the Service Descriptions and implement changes or upgrades as needed.
<b>Acquire SSL Certificates</b>	Third-party SSL certificates must be obtained and installed in your infrastructure to provide enterprise security for Office 365 service Offerings. The customer has acquired (or will acquire by the date agreed to with Microsoft in the project plan) a proper SSL certificate from a public trusted certification authority (e.g., VeriSign, GoDaddy) for Active Directory Federation Services.
<b>Active Directory Federation Service</b>	(If applicable) Setup Active Directory Federation Services 2.0 Federation and proxy servers in order to enable Single Sign On (SSO), prior to the migration of the first production mailbox. MCS will provide advice and guidance with the design of the ADFS service.

<b>Coexistence Servers</b>	(If applicable) Set up coexistence servers prior to the migration of the first production mailbox in order to enable email and calendar coexistence in which some of the company's users have mailboxes on premises and others have mailboxes on Exchange Online. MCS will provide advice and guidance with the design of the Exchange coexistence servers.		
<b>Directory Synchronization Tool (DirSync)</b>	(If applicable) If planning for ongoing synchronization between your local Active Directory and your Office 365 directory, the Directory Synchronization tool (DirSync) must be installed prior to migration of the first production mailbox by the date mutually agreed to by Microsoft and Customer in the Project Plan. DirSync should be installed on a server or virtual machine that satisfies the DirSync tool requirements. This server must be connected to the internal network, joined to the Active Directory forest to be synchronized, with outbound Internet access, and configured up to the operating system level including the most recent relevant updates. If the customer Active Directory forest has more than 50,000		
<table border="1"> <thead> <tr> <th data-bbox="175 877 483 961">Activity</th> <th data-bbox="483 877 1435 961">Description</th> </tr> </thead> </table>		Activity	Description
Activity	Description		
	objects, a license for <b>Microsoft SQL Server 2005</b> is also required for DirSync.		
<b>End User Workstation</b>	Prior to migration, ensure each end user workstation meets the Office 365 client requirements outline in the Service Descriptions.		
<b>Plan All End User Support</b>	Before migration of the first production mailboxes, plan for support of Office 365 users. This includes planning for escalation of support issues to Microsoft via a maximum of two points of contact (for example, the customer's project manager and technical lead or Exchange Administrator). Additional details on end user support can be found in the Microsoft Office 365 Enterprise Support Service Description.		
<b>Plan and Develop Help Desk and End User Training Plans</b>	Help desk and end user training plans must be developed.		

<b>Plan and Develop End User and Support Desk Communication Plans</b>	Communication plans and materials for end users and support desk staff must be developed.
<b>Migration Planning</b>	Perform migration user, workgroup, and delegate analysis. Define migration groups and migration schedule inclusive of all users and mailboxes to be migrated.
<b>Project Management</b>	Overall program and project management including management of “out of scope’ preparation and remediation activities. Reflect status and plans in the overall project plan and schedule.
<b>Phase Completion</b>	Sign off on Plan Phase.

**Table 3 - Plan Phase Customer Responsibilities**

### 1.3.4 Work Products / Deliverables

- **Discovery Workshop Findings** – This Word Document is between 8-10 pages and delivered by the Migration Deployment Consultant outlining key findings from the discovery workshops. The basis for this document serves as the findings of the Migration Due Diligence performed prior to contract signature.
- **Project Plan (Initial)** – Note: This project artifact does not require formal acceptance.

### 1.3.5 Plan Phase Exit Criteria

At the conclusion of the Plan phase, a formal checkpoint is to occur. Successful completion of the Plan Phase based on the following criteria described in Table 4:

Exit Criteria ID	Description
EXC101	Kickoff meeting held.
EXC102	Conditions of Satisfaction (COS) accepted by Customer.
EXC103	Project goals, assumptions, constraints, limitations, and dependencies have been defined and documented.

EXC104	Project plan and schedule transitioned to Customer Project Manager for ongoing ownership and maintenance.
EXC105	Discovery of current technical environment complete and findings documented.
EXC106	Completion of all requisite Microsoft activities as listed in Table 2.
EXC107	Completion of all requisite Customer activities as listed in Table 3.

**Table 4 - Plan Phase Exit Criteria**

## 1.4 Prepare Phase Overview

The Prepare phase continues the effort to provision the customer onto the selected Office 365 services. In the Prepare phase, the customer begins to take the steps to configure their environment for integration with the Office 365 environment.

During this phase, the team revises the detailed project schedule to include infrastructure preparation, testing, communications, and other related tasks required for a successful pilot implementation. Microsoft and Customer finalize the migration plan and schedule.

The MCS team will assist your team through knowledge transfer for many Prepare phase tasks.

A variety of validation and testing activities occur in the Prepare phase. The customer validates that AD FS is working properly and that DirSync is properly synchronizing environments. The completion of enabling the service and integrating user identities results in a milestone called Service Ready. At this time, the customer validates the features and functionality of the service is operating properly.

For customers who are not migrating data, the completion of the Prepare phase concludes the project.

### 1.4.1 Microsoft Responsibilities

Microsoft has the following Prepare phase responsibilities as described in Table 5:

Activity	Covering	Count (# of times performed)
<b>Domain Registration</b>	Provide guidance and recommendations on the registration and validation of required domains for Office 365.	1

<b>Active Directory</b>	Microsoft will provide an assessment of the customer's current Active Directory environment in preparation for moving to Microsoft Online Services and will provide consulting assistance with planning and configuration. <b>Note: The customer is expected to carry out required remediation though MCS will provide advice and guidance to help the customer through these tasks.</b>	1
<b>Single Sign On (Identity Federation)</b>	(If applicable) Assist with Active Directory Federation Services configuration to support Office 365 Single Sign On (Identity Federation) authentication requirements.	1
	(If applicable) Executes Windows PowerShell cmdlets to configure identity federation.	1
<b>DirSync</b>	(If applicable) Assist with installation and deployment of DirSync for directory synchronization.	1
<b>User Identity and Account Provisioning (when no DirSync)</b>	Automatically provision users in the Office 365 tenant using user lists and data provided by Customer (when Customer is not using Directory Synchronization).	1
<b>Coexistence Servers</b>	(If applicable) Assist with configuration of coexistence hardware and software.	1
<b>User License Activation</b>	Automatically assign licenses and activate users based on user list and account information provided by Customer.	1
<b>Client Requirements</b>	Provide guidance and recommendations on client configurations and software deployment processes.	1
<b>Service Configuration (for selected services)</b>	Provide guidance and recommendations for configuring Exchange Online.	1
	Provide guidance and recommendations for configuring SharePoint Online.	1
	Provided guidance and recommendations for configuring Lync Online.	1
<b>Support/Service</b>	Provide a 1 day overview of support processes, end user	1

Activity	Covering	Count (# of times performed)
<b>Desk(Consultant Assistance)</b>	training materials and use of the Administration Portal.	
<b>Validation and Testing</b>	Provide guidance on test cases and scenarios.	1
	Test and validate functionality of test accounts.	1
	(If applicable) Test and validate coexistence of test accounts.	1
<b>Migrate Pilot Users</b>	Execute pilot migrations based on pilot user list and data provided by Customer. Pilot includes migration mailbox data from on premises mailboxes to Exchange Online.	1
<b>Status Meeting</b>	Participate in weekly status meetings.	Per week
<b>Status Reports</b>	Document and provide weekly status	Per week
<b>Checkpoint</b>	Schedule and conduct Prepare Phase Checkpoint	1

**Table 5 - Prepare Phase Microsoft Responsibilities**

### 1.4.2 Customer Responsibilities

The customer has the following Prepare Phase responsibilities as described in Table 6: The emphasis is on the customer owning the following responsibilities as many of the actions require alterations to live production systems and therefore the customer will need to plan these changes into the project plan. However, MCS will be on hand to offer advice and guidance on all technical matters impacting the migration to Office 365.

Activity	Description
<b>Network and Naming Services</b>	Customer must add their domain to Office 365 and then create the DNS records to route domain traffic to their Office 365 service.

<b>User License Activation</b>	Provide license activation information for all license assignment to Microsoft.
<b>Single Sign On</b>	(If applicable) Install and configure Active Directory Federation Services (AD
<b>Activity</b>	<b>Description</b>
<b>(Identity Federation)</b>	FS) more than 30 days prior to the migration of the first production mailbox to support Office 365 authentication requirements including load balancing and any extension of the AD FS infrastructure to support high availability.
	(If applicable) Install and configure the Office 365 Federation tool.
	(If applicable) Publish AD FS endpoints on the Internet.
<b>DirSync</b>	(If applicable) Install and configure DirSync for directory synchronization more than 30 days prior to migration of first production mailbox.
<b>Coexistence</b>	(If applicable) Install and configure coexistence hardware and software more than 30 days prior to the migration of the first production mailbox.
<b>SSL Certificates</b>	Acquire third party SSL certificates as needed.
<b>Client</b>	Manage client imaging, software deployment and configuration management such that all clients and devices comply with the client requirements for Office 365.
<b>Configure Outlook Anywhere</b>	Configure Outlook clients to connect to Exchange Online over the Internet using the Outlook Anywhere connectivity (remote procedure call over HTTP) feature.
<b>Service Configuration</b>	Configure Exchange Online including, but not limited to, policies and controls for Role Based Access Control, ActiveSync and Outlook Web Access
	Configure Lync Online including, but not limited to, policies and controls for file transfer, audio and video, domain federation, and public instant messaging

	Configure SharePoint Online including, but not limited to, delegated administration
<b>Support/Service Desk</b>	Prepare customer service desk.
<b>Communication and Training Plan</b>	Finalize end user and help desk change management, communications and training plans.
<b>Communication and Training Plan</b>	Finalize end user and help desk procedures, documentation and training materials.
<b>Activity</b>	<b>Description</b>
<b>Mailbox Clean-up</b>	Perform mailbox size reduction to improve mailbox migration velocity.
<b>Migration Planning</b>	Finalize end user migration groups and schedule.
	Designated users for administrative roles within Office 365.
<b>Migrate Pilot Users</b>	Assist in Pilot Migration.
<b>Pilot Testing</b>	Test and validate functionality for pilot users.
	Test and validate coexistence (if applicable) for pilot users.
	Test help desk and support escalation and resolution processes with pilot users.
<b>Project Management</b>	Overall program and project management including management of “out of scope’ preparation and remediation activities. Reflect status and plans in the overall project plan and schedule.
<b>Phase Completion</b>	Sign off on Prepare Phase.

**Table 6 - Prepare Phase Customer Responsibilities**

### 1.4.3 Prepare Phase Exit Criteria

At the conclusion of the Prepare phase, a formal checkpoint occurs. Successful completion of the Prepare Phase based on the following criteria described in Table 7:

Exit Criteria ID	Description
EXC201	Migration groups defined; migration schedule developed and communicated to Microsoft.
EXC202	AD FS and DirSync (if applicable) functional and production ready (Directory Ready).
EXC203	Service configurations completed (Service Ready).
EXC204	Office 365 desktop software deployed.
EXC205	Migration testing is successfully completed.
EXC206	Coexistence testing successfully completed.
EXC207	All identified in scope users have been provisioned in Office 365.
Exit Criteria ID	Description
EXC208	Base features and functionality of selected Office 365 services are working properly (Service Validation).
EXC208	Federation (if applicable) works properly for both internal and external users.
EXC209	Completion of all requisite Microsoft activities as listed in Table 9.
EXC210	Completion of all requisite Customer activities as listed in Table 10.

**Table 7 - Prepare Phase Exit Criteria**

### 1.5 Migrate Phase Overview

The Migrate phase is focused on the steps required to move an on premise user mailbox to Exchange Online. The Migrate phase also includes activities which are specific to the Customer's existing mail system which are described in further detail below in Section 1.6.

Pilot migrations are performed for the pilot migration groups representing a diverse sampling of users. In addition to testing technical migration processes during the pilot, the Customer uses pilot migrations to test end user communications, training, help desk and support escalation procedures, and accept the Production system prior to beginning full velocity migrations.

During this phase, the Customer works with the Microsoft migration team to schedule and perform velocity migrations. Initial group migrations are intended to ramp up to a sustainable velocity consistent with migration minimums and the migration schedule. The customer is communicating with end users throughout the transition. This phase concludes with planned mailboxes migrated to Exchange Online. The team will then conclude the effort by holding a project closeout meeting.

### 1.5.1 Migration Scenarios

There are three typical scenarios for Migration and these are described below. The Customer implements only one of these scenarios. The scenarios for Exchange Server to Exchange Online migration are as follows:

#### 1.5.1.1 Migration Scenario 1: Cutover Migration

The mailbox migration scenario for cutover migration applies when DirSync is not in place. Because no coexistence capability is provided in this scenario, all mailboxes are typically migrated in one migration event (usually over a weekend).

#### 1.5.1.2 Migration Scenario 2: Staged Migration with Simple Coexistence

The mailbox migration scenario with simple coexistence applies when user mailboxes are typically migrated over an extended period of time, in different migration events, although the end goal is that all users will be migrated to Exchange Online. This scenario requires that DirSync be in place.

#### 1.5.1.3 Migration Scenario 3: Staged Migration with Rich Coexistence

The mailbox migration scenario with rich coexistence applies when the coexistence period is typically planned to extend beyond the migration project, because some users will remain on premises indefinitely. This scenario requires that DirSync be in place. For Exchange versions older than 2010, on premises deployment of Exchange Server 2010 SP1 with Client Access Service (CAS) and Hub roles is required. In addition, the Mailbox Server role is also required for Exchange 2003 public folder-based free/busy support.

### 1.5.2 Microsoft Responsibilities

Microsoft has the following Migrate phase responsibilities as described in Table 8:

Activity	Covering	Count (# of times performed)
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<b>Email Data Migration</b>	Execute production account migrations based on migration groups and scheduled provided by Customer.  Migrate mailbox data from on premises mailboxes to Exchange Online.	
<b>Project Closeout</b>	Conduct Project Closeout meeting including transition to Microsoft Support as appropriate.	1

**Table 8 - Migrate Phase Microsoft Responsibilities**

### 1.5.3 Customer Responsibilities

The customer has the following Prepare Phase responsibilities as described in Table 9:

Activity	Description
<b>Mail Migration</b>	Perform migration of client-side data if applicable.
	Assign resources to initiate, monitor, troubleshoot and complete migrations: During migration windows, personnel in your organization must be available to assist with managing migration activities which often occur on evenings and weekends.
	Individual users perform migration validation testing for their migrated mailbox.
	Perform Domain Name System (DNS) records management and update DNS records as needed.
<b>Communications</b>	Execute communication plans to inform all end users about the transition to

Activity	Description
<b>Plan</b>	Office 365 services and what is required of them. This communication should include migration groups and schedule for production migrations to Microsoft.
<b>Training Plan</b>	Execute training plans for your Office 365 end users and help desk.
	Distribute documentation and training materials.
<b>Help Desk</b>	Implement help desk escalation and resolution processes.
	Plan and coordinate all help desk support before the first production mailbox is migrated.
	Perform all help desk Tier 1 and Tier 2 support.
	Escalate Tier 3 support issues to Microsoft via a maximum of two points of contact, typically the Customer's Project Manager and Technical Lead or Microsoft Exchange Administrator.
<b>Project Management</b>	Overall program and project management including management of "out of scope" preparation and remediation activities. Reflect status and plans in the overall project plan and schedule.
<b>Project Closeout</b>	Sign off on Migrate Phase.

**Table 9 - Migrate Phase Customer Responsibilities**

#### 1.5.4 Work Products / Deliverables

- Daily Post-Migration Report
- Migrated mailboxes  Production  
Pilot completed for pilot users.

#### 1.5.5 Migrate Phase Exit Criteria

At the conclusion of the Migrate phase, a formal checkpoint occurs. Successful completion of the Migrate phase is based on the criteria described in Table 10:

Exit Criteria ID	Description
EXC301	Planned mailboxes successfully migrated.

EXC302	End users validate features and functions of the service post-migration.
EXC303	Migration Phase signoff complete.
EXC304	Project Closeout meeting complete.
Exit Criteria ID	Description
EXC305	Pilot migration successfully completed.
EXC306	Completion of all requisite Microsoft activities as listed in Table 8.
EXC307	Completion of all requisite Customer activities as listed in Table 9.

**Table 10 - Migrate Phase Exit Criteria**

## 1.6 Mail Migration Scenarios

The migration options offered within this service description assume the customer is migration from a Microsoft Exchange platform. The pricing for the MPD service is also dependent on the velocity of mail migrations or rather the length of time required for the migration phase. The migration velocity, mailbox sizes and on premise mail platform will all impact the final price of the MPD service.

### 1.6.1 General Assumptions

The weekly migration schedule days and times have the following parameters:

- There must be a consistent number of migration events per week, on consistent days of each week.
- There is at least one migration event—one batch of Exchange Online activations and data migrations—per migration day.
- Start times for migration events may be different on different days of the week.
- There is a weekly target of 1,000 users to be migrated with a migration event minimum of 500 users.

#### Note

If a migration event falls below the minimum target by 10 percent or more, project delays and additional fees may be incurred.

A lockdown period is the period of time before a migration event when no additional users may be added to or dropped from a scheduled migration event. The lockdown period for adding users is

determined based on the time requirement for preparing accounts for migration and will be mutually agreed upon before the migration of the first production mailbox.

### 1.6.1.1 Exception Events

An exception event is a migration event in which the number of users falls below the migration event target minus 10 percent. These are the assumptions concerning exception events:

- Any migration event that falls below the allowed minimum is either cancelled or treated as an exception event, to be agreed upon by all parties.
- An exception event may impact the project schedule and result in additional fees.

### 1.6.2 Mail Migration Scope

- Microsoft provides assessment of the customer's current Active Directory preparation for Microsoft Online Services, and assistance with planning and configuration. Remediation assistance is not considered in scope for this Offering, though technical advice and guidance is.
- Supported platforms for Customer's existing mail system include:
  - Exchange Server 2010, Exchange Server 2007, Exchange Server 2003
  - Hosted Exchange Server 2010, Hosted Exchange Server 2007
- Migration includes up to 500 megabytes (MB) of server-based data per mailbox for supported content types. Note that additional fees will be applied for mailboxes with greater than 500 MB of server-based data.
- Mail data migration is limited to server-based data for all content types.

### 1.6.2.1 Supported Exchange Content Types

The Exchange content types supported for migration to Exchange Online are listed in Table 11 below:

Area	Content Types	Cut Over and Staged Simple Exchange Migration	Mailbox Migration with Rich Coexistence
Mail	Message items	Yes	Yes
	Folders	Yes	Yes
	Rules	Outlook server-side rules only	Yes
	Categories	Yes	Yes
	Read status	Yes	Yes
	Flags	Yes	Yes
	Mapping of special folders	Yes	Yes
Calendar	Calendar items	Yes	Yes
	Recurrence	Yes	Yes
	Exception	Yes	Yes
	Meeting requests	Yes	Yes
	OOF settings	Yes	Yes
	Categories	Yes	Yes
Other	Tasks	Yes	Yes
	Notes	Yes	Yes
	Contacts	Yes	Yes
	Public delegates	Yes	Yes
	Folder permissions	Yes	Yes
	Send/receive as	No	Not Yet
	Full mailbox permission	No	Not Yet
	Custom forms	Yes	Yes
	Folder favorites	Yes	Yes
	Public folders	No	No
	Offline data file (OST)	No	Yes
	Outlook data file (PST)	No	Not migrated but maintained under same profile

**Table 11 - Microsoft Exchange Server Supported Migration Content Types**

## 1.7 Glossary

Term	Description
COS	Conditions of Satisfaction
CSAT	Customer Satisfaction
DB	Database
MCS	Microsoft Consulting Services
MODG	Microsoft Online Deployment Guide
Office 365	Microsoft Office 365
Office 365 SD	Office 365 Service Deployment
SDM	Services Delivery Methodology

**Table 12 - Glossary**

### 1.7.1 Notes on Costs

MPD is a fixed price, fixed scope engagement. The catalogue unit price is £3.03 per mailbox migration and may increase depending on each organisations specific requirements. Prices are dependent on:

- The technology that is being migrating from
- The amount of mailboxes
- The size of mailbox
- Amount of remediation work required before migration.

This will be determined during a scoping exercise between the customer and Microsoft.

## 2 Bespoke Microsoft Cloud Services for Azure

### 2.1 Description

Microsoft offers a range of bespoke services relating to all aspects of the Windows Azure Cloud platform (whether in public, private or hybrid configurations). This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 2.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

## 3 Bespoke Microsoft Cloud Services for Dynamics CRM Online

### 3.1 Description

Microsoft offers a range of bespoke services relating to all aspects of the Microsoft Dynamics CRM Online platform. This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 3.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

## 4 SharePoint Online

### 4.1

Microsoft offers a range of bespoke services relating to all aspects of the SharePoint Online platform (whether in public, private or hybrid configurations). This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 4.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

# Bespoke Microsoft Cloud Services for

## Description

## 5 Bespoke Microsoft Cloud Services for Lync Online

### 5.1 Description

Microsoft offers a range of bespoke services relating to all aspects of the Lync Online platform. This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 5.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.



# Bespoke Microsoft Cloud Services for

## Description

### 6 Exchange Online

#### 6.1

Microsoft offers a range of bespoke services relating to all aspects of the Exchange Online platform. This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

#### 6.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.



## 7 Hyper-V Cloud

### 7.1

Microsoft offers a range of bespoke services relating to all aspects of the Microsoft Hyper-V Private Cloud platform. This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 7.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

## 8 Office 365

### 8.1

Microsoft offers a range of bespoke services relating to all aspects of the Microsoft Office 365 suite. This includes strategic guidance, custom development, design, technical implementation and support. Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.

### 8.2 Notes on Pricing

Bespoke Microsoft Cloud Services are fixed price, fixed scope engagements. The catalogue unit price of £5,000.00 is an entry level value, and may increase depending on each organisations specific requirements, which will be identified in an initial scoping phase.