
ATTACHMENT B- SPECIFICATIONS
Active Directory and Exchange: Migration
Phase II

The University of Wisconsin Colleges and University of Wisconsin-Extension is issuing a Request for Services (RFS) to: 1) lead the build out of a Windows 2008 Active Directory forest and Exchange 2007 organization, and 2) migrate current Windows and Exchange 2003 objects into the new environment.

This is phase II of a two phased project. Phase I resulted in an administrative design model for the new Active Directory that has been accepted by all stakeholders. This project will be implemented based on that adopted architectural design; however, minimal modifications that improve the overall objectives for phase II will be considered.

The primary selection criteria for vendors submitting a bid for this RFS will be based on the following:

- Ability to provide a comprehensive solution to meet the stated requirements outlined in this document
- Highly skilled and demonstrated project manager that can manage all aspects of the project and ensure successful project outcomes
- Adequate technical resources allocated throughout the project to supplement UWEX-UWC technical personnel
- Appropriate certifications, training and hands on experience for this solution
- ITIL best practice framework
- Similar successful projects with Higher Education institutions
- Acceptable project timeline and costs

The selected bidder and all employees are required to maintain the strictest confidentiality. They shall not disclose, transfer or sell any information they acquire through fulfilling the requirements of this RFS. Any breach of confidentiality will nullify an awarded contract.

Deadline for Proposals:	May 20 th , 2009
Bidders Conference:	May 7 th , 2009 1:30 PM
Contract Start Date (estimated):	June 15 th , 2009 2:00 PM CST

SECTION I: SUMMARY

In September of 2004, the UW System President advanced the idea of integrating the central administrative operations of the UW Colleges and UW-Extension as a way to cut costs. The two institutions were identified as having three things in common: 1) both were headquarters in Madison; 2) both had access to the University of Wisconsin resources as their core mission; and 3) both were statewide institutions in terms of physical presence.

An outcome of the above was the formation of the Administrative Integration Steering Committee (AISC). Members of this committee defined seven goals, with one being to *“identify, select and guide multiple work teams responsible for assessing specific Madison-based administrative functions/units and options for integration.”* From that, the Information Technology Subcommittee (ITS) was formed.

ITS focused on efficiencies that could be achieved through the administrative integration of technical operations. The Madison based technical operations unit for the UW Colleges and UW-Extension that provided centralized core technical support and data center management for the two institutions merged and is now identified as Central Information Technology Services (CITS).

SECTION II: CURRENT SUPPORT STRUCTURE

Central Information Technology Services is the organization that supports and maintains a complex environment with enterprise applications and services specific to the UW-Extension, the UW Colleges, system wide efforts or any combination of the aforementioned. This newly integrated work unit is staffed with employees that prior to integration were dedicated to supporting their respective networks.

Both institutions operate under a centralized/decentralized model. The original build of the network for each organization was based on different philosophies and were completely independent of each other; therefore, hardware, operating systems, and applications were varied. Each maintained an exclusive Madison based data center.

The current UW-Extension network supported by CITS includes backend solutions for administrative services and the four Extension divisions which are: Cooperative Extension, Broadcast and Media Innovations, Entrepreneurship and Economic Development, and Continuing Education and Outreach E-Learning. The primary point of authentication and backend server systems for most of the Extension operations is Novell Netware. The customer base extends to all 72 Wisconsin counties. CITS administers the InfoSys LAN.

For Colleges, Central Information Technology services supports the 13 two year regional campuses, the Online program, and central administrative employees. The network supports roughly 24,000 student accounts and 3,200 faculty and staff members. The primary point of authentication and server system of the Colleges is Microsoft Windows Server. Each of the 13 regional sites has a Domain Controller and an Exchange 2003 server that is administered by CITS. Other servers and application that reside at the campuses are the responsibility of the on-site network administrator(s).

A major efficiency identified in the administrative integration was to move both institutions to a common message and calendaring system. Because Microsoft Active Directory and Exchange was already established across the Colleges, Exchange was chosen as the common platform to move Extension to. A middle solution was implemented to bridge the two networks so that Exchange could be deployed to Extension employees. In March of 2006, an effort began to create these users into the existing AD architecture facilitating the move to Exchange. Today all divisions/units/colleges (with one exception) share the Exchange 2003 enterprise collaboration suite.

The current Active Directory implementation is from pre-integration and was solely designed to meet the needs of the UW Colleges. The environment is Windows Server 2003 and Exchange Server 2003 in a single forest, single domain, multi-site architecture.

This current AD design lacks best practice standards and is not effective to support the requirements for the two organizations centralized and decentralized models.

PHASE I: (complete)

Phase I of this design and migration project produced an administrative design model for the new Active Directory that has been accepted by all stakeholders. This project (phase II) will be implementation based on that adopted architectural design; however, modifications to the design that improves the overall objectives for phase 2 will be considered.

The purpose of the new AD design was to promote efficient distribution of centralized and decentralized management of the Windows environment. The proposed Organizational Unit (OU) structures, Group Policy Objects (GPO's), and delegated permissions aim to provide greater efficiency, security and flexibility.

Objectives for the AD design considered:

- Active Directory as the UW Colleges and UW-Extension's authoritative directory service for primary authentication
- Windows Server 2008
- Microsoft Exchange 2007 as the e-mail and calendaring collaboration suite
- Naming convention standards for all object types
- Active Directory integrated DNS
- Consideration of server roles, Group Policy Objects, and Organizational Unit structure
- Forest / Domain / Site recommendation
- Active Directory administrative delegation
- SharePoint Server 2007
- VPN, wireless, mobile devices
- Development, test and production environments
- Central and decentralized partnerships
- Incorporate best practices

SECTION III: APPROACH

A new data center has been constructed on the Madison campus. The facility has full environmental controls and tight security access. It will house the new infrastructure for the integrated operations of the Colleges and Extension, and provide controlled DC space for other Madison departments. The two existing data centers being used by CITS will eventually be decommissioned.

Several activities are taking place in parallel. High end servers and an enterprise storage area network are operational in the new DC. Infrastructure services have been established and existing servers and/or applications are being migrated.

Hardware and software for the new Windows Server 2008 Active Directory forest and Exchange 2007 organization are available at the new DC. Windows 2008 read only domain controllers have been purchased for the 13 regional campuses. No installs have taken place.

Microsoft Identify Lifecycle Management (ILM) has been purchased and will be used to synchronize passwords, accounts, and groups between the Active Directory domains. Active Directory Migration Tool 3.1 (ADMT) will be used to migrate AD objects between the disparate Active Directory domains and forests. Public Folder Inter-org Replication Tool from Microsoft will be used to replicate public folder data into the new environment. This is the preferred tool set.

Active Directory will be the authoritative directory service for primary authentication for centralized and decentralized units with pass through to Novell environments including InfoSys. Best practice on how to configure the client to improve the user experience must be considered.

SECTION IV: SOURCE DOMAIN INFORMATION

Details of the current Active Directory forest:

- 19 domain controllers
- 23 Exchange Servers
- Groups total: 7,643
 - 685 distribution groups
 - 966 security groups
 - 784 security/distribution groups
 - Remaining are class groups
- Mail Enabled Groups: 1,424
- Public Folder: 10,102
- Public Folder Size: ~30GB
- 75,000 objects
- ~27,000 user accounts and Exchange mailboxes
- Trusts: 1 outgoing / 2 incoming
- Registered domain names: uwc.edu and uwex.edu
 - We support 200 domain names
- Other operating systems: Novell, Linux, CISCO IOS

SECTION V: SCOPE OF WORK (Phase II)

Provide highly skilled project management and technical resources to work with assigned UWEX-UWC technical staff throughout the project. This project will have shared responsibilities; however the bidder must plan for adequate resources to balance effort hours and maintain achievable timelines.

Incorporate best practices and lead efforts to build the new Windows 2008 and Exchange 2007 environment. All regional campuses will require a RODC to support the new forest. The hardware has been purchased and is available.

Implement the new instance of Active Directory to support authentication and authorization to resources. Implement the tool sets to support account synchronize and migration including ILM, ADMT and the Public Folder Inter-org Replication Tool. Migrate all directory objects, services, and (non-student) mailboxes to the new Active Directory forest. Implement pass-through authentication for Extension's Novell environments. Decommission source domain.

Users in the new and old environments must be able to access all resources and systems during the migration period.

Student mailboxes will move into a hosted environment at Live@edu. ILM will be used to implement this solution. A Microsoft partner has been selected to assist with the Outlook Live solution for students. This adds complexity in the short term (migration), but will reduce the number of mailboxes that need to be migrated to Exchange 2007 by about 22,000. The Live@edu initiative is targeted for September of 2009; therefore, consideration should be worked into the project strategy.

Mailboxes for faculty and staff at the regional campuses will move from the decentralized Exchange 2003 servers to the centrally managed Exchange 2007 organization. Students mail will be forwarded to Outlook live. As all mailboxes are moved off of the remote Exchange 2003 servers those systems will be shut down.

Knowledge transfer is expected to occur throughout Phase II. The selected partner will ensure that their technical resources are appropriately allocated and work closely with CITS technical staff to complete this project in a prompt yet realistic timeframe. Technical documentation is the shared responsibility of the vendor and CITS and will be produced throughout the life of this project.

A sizeable work area has been reserved so that resources on this project can operate in a team environment. Test and production environments must be built and documented adhering to best practices.

Areas directly supported by CITS that are impacted by this project include the 13 remote campuses, the Online campus, the Extension divisions, the College's central functional work units (financial aid, PeopleSoft, business office, registrar), the Chancellor's integrated administrative offices.

Phase II must strive for no service interruptions; however, minimal outages may be unavoidable. When a possible service disruption is a potential risk or determined inevitable, work will be performed

during a scheduled maintenance window or agreed upon alternative and the user population will be adequately notified.

SECTION VI: ADDITIONAL INFORMATION AND RESTRICTIONS

Roles:

Executive Sponsor: Marsha Henfer, Assistant Vice Chancellor of Information Technology
Project Director: George Russell, Director of Technical Operations
Project Resources: UW Colleges and Extension employees will be assigned to the project as required

- Central Information Technology Services reserves the right to request clarification of any proposal.
- Submission of a proposal does not commit the UW Colleges or UW-Extension to make an award or to pay any costs incurred in the preparation of a proposal in response to this request.
- Proposals will become part of the UW Colleges and UW-Extension file without any obligation on the University's part.
- The UW Colleges and UW-Extension have sole discretion and reserve the right to cancel this proposal and to reject any and all proposals received prior to award, to waive any or all informalities and / or irregularities or to re-advertise with either identical or revised specifications.
- Work performed by the vendor that impacts hardware, software, network connectivity or user experience requires coordination with the Executive Sponsor or Project Director.
- Any proposal received after the deadline date and time will be eliminated from consideration.
- The selected proposal will provide the most cost-effective comprehensive solution based on best practice and overall approach.
- Selected bidder and all employees are required to maintain the strictest confidentiality.
- Complete technical documentations in electronic format must be provided to the Sponsor or Director.
- The award of this bid will be based on proven expertise, past similar project success, professionalism, cost, timelines, resources and overall submission.
- The proposed kickoff for this engagement is June 15, 2009.
- This is a fixed bid project.

SECTION VII: ITEMS REQUIRED FOR SUBMISSION OF BID

1. Primary name(s) and contact information for persons responsible for the bid submission.
2. A high level project plan. Provide sufficient detail to support this Active Directory and Exchange migration. The plan must support the objectives and scope as outlined in Sections II through V.
3. Proposed technical resources: include effort hours for project phases, their area of technical expertise and relevant certifications.

4. Proposed Project Manager: specific involvement in similar implementations, number of Project Management hours and engagements. Relevant certification and ITIL exposure and practice.
5. A narrative on the proposed overall methodology that would be used in this project including resource staffing and expertise, timelines, knowledge transfer, environments (test and production), risk mitigation, communication practices and commitment to success.
6. Experience executing project work in a higher education institution.
7. A description demonstrating your company's past experience in leading an Active Directory and Exchange 2003 migration. Provide a minimum two cases/projects. Include an overview of the projects deliverables, outcomes and size of organization.
8. Identify past relevant experience, certification and training level of proposed personnel. Include specific roles and areas of expertise in executing an implementation as outlined in this bid. Contracted resources that become allocated to this project may not be reassigned without approval of the Executive Sponsor.
9. Include any additional statements you wish to convey to the bid coordinator.
10. Fixed bid being submitted for Project Implementation as outlined in this document.
11. All Bid Response Requirements as listed under 1.1 of Contract No: EX 09-0006.
12. Date available and estimated project duration.

A bidders conference is scheduled for May 7, 2009 at 1:30 PM in Madison, Wisconsin.