

Statement of Work

Version 1.0

Microsoft Active Directory Design and Integration Project

University of Florida



Document Control

Scope of Work for Project

Preparation

|  |  |  |
| --- | --- | --- |
| Action | Name | Date |
| Prepared by: | Larry Peckham | 10/10/2002 |

Release

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date Released | Change Notice | Pages Affected | Remarks |
| 1.0 | 10/10/2002 | N/A | All | Initial release |

Distribution List

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# Executive Summary

The University of Florida has asked Dimension Data to provide this Statement of Work to propose developing a centralized Active Directory. The University of Florida has recognized the need for a centralized directory to facilitate the sharing of data and information across like systems. The existing infrastructure is highly fragmented causing reduced interoperability and increasing the cost of ownership. The adverse effect of this approach to IT management is obvious when projects such as centralized ERP systems are contemplated. The University of Florida has defined numerous integration requirements and the need for a flexible administration model which Dimension Data will architect into the design. These business goals are described in more detail in Section 1.1.3 of this document.

Dimension Data will work with the University project team to:

* Design the Windows 2000 Active Directory architecture
* Identify options to integrate various business systems, application directories and security enablers
* Develop a high level plan for end-user migration to the new environment
* Provide documentation of the new environment
* Provide knowledge transfer to University of Florida project team members

Dimension Data proposes to provide this design and assessment using our subject matter experts and estimates this activity will require 6 weeks of consulting labor. Dimension Data will charge $150 per hour for this activity for a cost of $36,000.

The value propositions of using Dimension Data in support of this project are:

* Proven project methodology that delivers consistent results. The Dimension Data Primer methodology has been used and refined on hundreds of IT projects including AD design engagements.
* Leveraging our experience at the deployment of Windows 2000 Active Directory to avoid common architecture design mistakes. Dimension Data has completed well over 60 successful Active Directory implementations.
* Using our subject matter experts to complete the project quickly. Rapid project completion minimizes disruption and allows organizations to realize cost savings quickly.
* Having the University of Florida IT staff work closely with our consultant(s) to learn the intricacies of directory design and integration. A key distinction of the Dimension Data approach to all of our projects is making sure that local IT staff is well positioned to take over administration upon project completion.

# Delivery Scope

## Assessment / Project Definition

* The review of any documentation supplied by the University of Florida
* A project kick-off meeting to gain a common understanding of the project goals and requirements

## Interviews & Analysis

* Interview project members, personnel and management as identified by the directory project team to derive a comprehensive list of requirements.
* Compile a list of directories in use and planned for the University of Florida and identify the integration capabilities of those systems.
* Evaluate the physical environment findings with results from interviewswith key stake holders.

## Design requirements

The University of Florida has specifically detailed capabilities to Dimension Data as design requirements. The design documentation will specifically address the following criteria:

* It is the stated desire of the project team to unify all Microsoft based systems under a common Active Directory. Dimension Data will provide an Active Directory design that will scale to meet this need.
* The design will allow the University of Florida to maintain control of the overall architecture while allowing diverse parts of the organization to work together without sacrificing autonomy and control over local resources.
* The architecture will provide the ability to incorporate the technology necessary to provide it’s users with single sign-on authentication access to applications, services, and shared resources across platforms. The engagement documentation will detail options that provide this capability.
* Interoperability with the existing campus Kerberos system and the ability to deploy x.509 certificates, Smartcards and other technical solutions will be reviewed and recommendations made. .
* Calendaring and messaging integration options will be addressed.
* The Active Directory architecture will support a unified directory that can be populated with data from the centralized ERP system and other systems as appropriate.
* The design will be capable of supporting applications that support the distribution of client-based software and tracking of university managed licenses.

## Documentation Detail

The design documentation will specifically address the following areas defined by the University of Florida:

* DNS – centralized vs. decentralized
* Scalability
* Hardware requirements
* Anticipated impact on help desk for support of MS suites, etc.
* Is Shands participation possible? License issues/Opportunities
* Security (HIPAA, FERPA, Buckley)
* WAN implications (especially IFAS)
* Project Website
* Integration/Interoperability
	+ Integration tools
	+ GatorLink
	+ ERP
	+ Kerberos
	+ NDS
* Disaster Recovery
* Backups and redundancy
* FTE requirements (Near and long term.)
	+ Training
	+ Continuing education
* Outreach
* Support of legacy OS – WINS, others
* Single sign-on
* Assessment and reality check
* Best practices
* Account management
	+ Administrative access
	+ Group management
	+ Scripting tools

## Exclusions

The following are excluded from the project scope

* This project provides an architectural design but does not provide for the implementation of the Active Directory.

## Deliverables

The deliverables are listed below and will be delivered in writing and on CD-ROM media in the form of Microsoft Word documents, Microsoft Excel spreadsheets and Microsoft Visio diagrams.

* Documentation and graphical depictions of the new active directory design
* Documentation of the design elements of the Active Directory design
* Documentation of high-level deployment and migration plans

## Customer Responsibilities

The University of Florida is responsible for:

* The nature of this engagement dictates that Dimension Data receive frequent and enthusiastic response from the appropriate personnel.
* A weekly review between the Dimension Data consultant and the University of Florida directory project lead or his designate will ensure that the expectations of this engagement are met.
* Client will assign a key contact who will be responsible for providing Dimension Data with information, access to personnel, and facility access.
* Client will provide a work area space with desk, chair, Internet access (via the Client’s network or analog phone line), and at least one telephone for use by Dimension Data to conduct project business while working on-site.

## Investment Costs

* This is a time and materials contract. The consulting rate is $150 per hour and the estimated cost to undertake this project is $36,000.
* The University of Florida will be billed separately for travel costs will be billed at actual cost and will not exceed $6,000 for the entire project.
* This price is based on work taking place during business hours Monday to Friday 8:00 a.m. to 5:00 p.m.

### Payment Schedule

Table 1

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Percentages** | **Amount** |
| Final Delivery | 100% | $36,000 |

Table 1 – Payment Schedule

## Acceptance Criteria

At the conclusion of this evaluation, all deliverables for this phase will be presented to University of Florida for review.

University of Florida will have five business days from the date of delivery of any document that is a deliverable to review it and request any changes. If Dimension Data does not receive notification of any required changes within this period, the document will be deemed to have been accepted without modification and will be reissued as a final copy.

If Dimension Data is notified by University of Florida, within the above time frame, of any changes required, Dimension Data will within two business days of such notification implement those changes as have been agreed between the parties. A final copy of the document will then be submitted to University of Florida.

## Assumptions

### General

* All documentation created for this project will be available in hard copy and electronic format.
* Any modifications to the scope of work will be handled through a change control process and will be agreed to by both parties.

### Commercial

It is assumed that:

* Additional costs may be incurred where any delay not under the control of Dimension Data that causes Dimension Data personnel to not fulfill their scheduled tasks.
* An authorized delegate of University of Florida will be available at the time of completion of the build phase so that all documentation can be accepted and signed.
* Additional costs may be incurred where any work scheduled to be undertaken by Dimension Data is postponed by University of Florida within 24 hours of its commencement.
* All changes to schedule or technical requirements must be provided to Dimension Data in written format. Email is included as written format. Receipt of all correspondence should be confirmed by phone wherever possible.
* University of Florida has accepted the costs/times estimate as detailed in this document
* University of Florida has accepted the Dimension Data standard terms and conditions attached to this document.

## Intellectual Property

Unless otherwise agreed in writing, University of Florida acknowledges that all intellectual property rights attaching to the products or arising out of the provision of services are and will remain the property of Dimension Data (or its supplies, where such rights are owned by that supplier).

Software will be licensed to University of Florida on the terms of the relevant license agreement provided with the product or as otherwise agreed between Dimension Data and University of Florida in writing.

Please refer to the Dimension Data Standard Terms and Conditions attached to this document for a full description of the terms and conditions governing intellectual property.

APPROVED BY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

POSITION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Directory Services Vision Statement

The current University of Florida highly distributed computing environment includes a wide range of Microsoft products and desktop operating systems, spread across many Domains or Workgroups. These distributed computing systems have de-centralized systems management. This leads to redundant management tasks, reduced interoperability, isolation from other systems, and increased total cost of ownership. While this committee recognizes that a single centralized and homogeneous network system may not be in the best interest of the University of Florida to support its diverse and competing missions, it recognizes the need for like systems to share resources and interoperate and collaborate to a much greater degree. It is our ultimate vision to unify the Microsoft based systems under a common Active Directory that will allow them to work together, without sacrificing autonomy and control over local computing resources. This integration will immediately serve to enhance the effectiveness of the current ERP project initiative and other systems currently under development, both during the development phase and later as an integral part of ERP product delivery. In the future, it will enhance security and stability by facilitating best practices across management domains, and provide a cost-effective platform for future enterprise development.

This committee wants the implementer to develop within the University of Florida a Microsoft computing environment that provides its users with single sign-on authentication to access applications, services and shared resources, both under Active Directory and other platforms while complying with local, state, and federal rules and regulations. The system will incorporate heightened security by providing for multiple authentication protocols and assure compliance with security and confidentiality requirements imposed at the state and federal level. It will interoperate with the existing campus Kerberos system, and provide for the use of X.509 certificates, Smartcards, or other technical solutions serving pertinent security applications. It must most certainly support a unified directory populated with pertinent data derived from the central ERP and other systems as they develop. This environment will also include integrated email and calendaring for those who participate in the central Active Directory, and it will interoperate with all other sanctioned campus calendaring and email systems. This system will support distribution of client based software and tracking of university-managed central licenses

While a central Active Directory can’t be everything to everyone, it will be a critical and essential element in supporting the University of Florida’s drive to transform higher education with advanced technology.

1. Dimension Data Primer Framework

**Inception Phase**

Articulating the customer’s vision for a solution

**Definition Phase**

Defining the solution

**Build Phase**

Creating the solution

**Deployment Phase**

Deploying the solution into the customer’s environment

**Transition Phase**

Transition to new ownership

1. Project Management Methodology

*A professional project management methodology - Primer (that is implemented, monitored and controlled) is imperative to the success of complex and/or large projects.*

**1.1***Every project is different* - in what it is trying to achieve, in its pressures, constraints and in the individuals involved. There is no single ‘right way’. The very essence of success lies in the project team’s ability to apply sound process and proven disciplines in a flexible way to suit the particular characteristics of each project.

**1.2***The Primer methodology* provides an industry leading process and toolkit for successfully managing projects. By managing projects in a consistent and professional method, ensures solution delivery to the highest standard of customer service whilst facilitating the objectives of the company and its personnel.

**1.3***The Primer methodology is compliant with* ISO 9001 and the Project Management Body of Knowledge (PMBOK), which is published by the Project Management Institute (USA).

The PMBOK is the global de facto industry standard for project management.

**1.4***The Project Management Institute* has (in the PMBOK) summarized the following nine key functional areas of project management:

1. Integration management
2. Scope management
3. Time management
4. Cost management
5. Quality management
6. Human resource management
7. Communications management
8. Risk management
9. Procurement management

**1.5** *Within each of the ninefunctional areas* there are five integrated processes that should be applied:

1. Initiating
2. Planning
3. Executing
4. Controlling
5. Closing