ATTACHMENT 2

DynTek CoSB O365 SharePoint Project
v.20200628

County of Santa Barbara, California

Office 365 and Sharepoint Project
including Project / Program Management

June 28th, 2020

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A. Table of Contents

B. PHASE A - ANALYZE AND DESIGN

PHASE A1: O365 ANALYZE

Overview

DynTek starts all its engagements with analysis. The team assigned to your project will perform analysis, both current environment and your requirements, as appropriate to the needs of the solution.

Activities

The following activities will be performed during this phase of the project:

Client Environment Discovery

It is important at the outset of the deployment project to gather and capture information about the existing IT environment. Discovery activities provide a comprehensive and up-to-date record of the technology solutions implemented by our organization.

This process involves gathering information in the following areas:

- On-premises infrastructure servers and components
- Network architecture and DNS
- Authentication solutions
- Bandwidth
- Mail routing
- Review of Unified Messaging Requirements
- Review of Archiving Systems Requirements
- Review of Public Folder Requirements
- Certificates
- Hardware and software
- Mobile Devices
- Mailbox sizing and velocity/duration estimates for migration
- Office 365 CAS/HT integration design
- Review ADFS and CAS/HT integration
- Review AD Synchronization (AD Connect) installation and Hybrid Exchange
- Tenant provisioning (Setup Office 365 Account)
- Tenant DNS domain validation (registration of Client's Domain in Office 365)
- Tenant Partner of Record (POR) validation and recording

- Onsite review of County systems to capture information about existing environment, including usage patterns and administrative practices
- Identification of potential challenges in migration and proposed solutions
- Network, name services and connectivity planning
- Bandwidth assessment for on-going Office 365 operations
- Assessment and documentation of client configurations, including identification of necessary changes from current configuration standards
- Bandwidth and connectivity assessment to calculate migration cadence
- Assessment and documentation of client configurations, including identification of necessary changes from current configuration standards
- Bandwidth and connectivity assessment to calculate migration cadence

Deliverables

Current State documentation that provides an overview of the environment before the implementation of our solution. This document typically contains textual and graphical depictions of logical and physical network topology, rack elevations, configuration backups, IP address schemes, Vlan structure, current environment issues list, current and roadmap applications, as well as other pertinent information.

PHASE A2: O365 DESIGN

Overview

Based on the desired solution and understanding of the current state, the project team will develop a design and implementation plan. This is intended to be an interactive phase and will result in comprehensive design documentation, and a plan to efficiently implement the design.

Activities

Client Environment Design

It is important at the outset of the deployment project to gather and capture information about the existing IT environment. Discovery activities provide a comprehensive and up-to-date record of the technology solutions implemented by our organization.

This session defines the customer objectives and introduces the new features of the solution. There are two main components to the session- an overview of the business problem and the definition of customer objectives. The purpose is to translate the business problem and solution statements into a high-level solution and summarize how the solution could integrate with the customer's environment.

The Design sessions introduce customers to the features and functionality of the solution and demonstrate how those features are deployed to help meet the customers' requirements. Topics typically include defining Vision and Scope, building an Infrastructure Overview and the creation of a Solution Concept.

The following activities will be performed during this phase of the project:

- Develop Migration Plan and Roadmap
- Develop Migration Strategy
- Develop Designs for ADFS, AD Connect and Hybrid Exchange
- Design for Mail Flow, Coexistence and Messaging Requirements
- User identity, access and provisioning planning
- Exchange online services planning
- Skype for Business or Teams online services planning
- Office 365 services planning
- SMTP services planning
- Data loss prevention planning
- Plan for a comprehensive backup solution for Office 365 content and data
- Identification of all Microsoft licenses required for expected general and scenario specific use cases
- Identification and planning of role-based administration and the separation of duties following the principle of least privileges
- Identification and planning of necessary reports for performance, health and usage metrics of Office 365 messaging services, including administrator activities
- Compliance search, e-discovery, archive, mailbox quota and retention planning
- Planning for clean-up of existing data including AD attributes and email and contact contents
- Planning and design of conditional access for Microsoft Outlook, Outlook Web Access and managed mobile access configuration
- Planning for configuration of compliance, e-discovery, and archive components, including policies and roles-based access
- Planning for configuration of outlook web access and exchange active sync, including conditional access requirements where appropriate
- Preparation of reports for usage, performance and service health metrics
- Preparation of reports for auditing of administrative activities, including provisioning and de-provisioning, compliance/e-discovery activity, and configuration changes
- Exchange online service design
- Develop migration strategies from SharePoint 2013 to SharePoint online

- Develop migration strategies from Skype for Business 2015
- SMTP service configuration planning
- Secure messaging configuration planning
- Initial retention policy configuration planning
- Initial data loss prevention policy configuration planning
- Anti-spam and anti-malware protections configuration planning

Deliverables

At the conclusion of this phase, DynTek will provide design documentation that specifies the components and configurations expected for the solution. This will include a high-level design utilizing details gathered from the analyze phase. This will be the foundation on which the solution will be built and used as a reference to the proposed outcome of the implementation.

PHASE A3: SHAREPOINT ANALYZE AND DESIGN

Overview

This phase will allow DynTek's SharePoint experts to configure SharePoint Online, standardize procedures and processes, replication the on-premises environment and migrate content from the on-prem system to SharePoint online.

Activities

Step 1 Inventory

- Create Inventory off all webs/assets that will be migrated
- Assign Business and Technical owners to each asset
- Determine assets that are no longer needed and can be archived

Step 2 Design

Planning and Design sessions that would cover the following areas:

- SharePoint Systems Planning
    - Define Branding
    - Define Sites and Services Configuration
    - Integration with Office 365, define decisions on roadmap, and next steps
    - Investigate Design for Integration with OneDrive for Business
    - Review of SharePoint Online design features
        - Logical Architecture
        - Sites
        - Information Architecture
        - Authentication and Security
        - Content Management

        - Maintenance and Monitoring
    - Analysis of the existing SharePoint sites
    - Analysis of Systems Integration requirements
- Creation of SharePoint Online Design
    - Logical Architecture
    - Sites
    - Information Architecture
    - Authentication and Security
    - Search Architecture
    - Content Management
    - Business Intelligence
    - Governance
    - Maintenance and Monitoring
- SharePoint Integration Planning
    - Flow implementation plan
    - Logic Apps implementation plan
    - Power Apps implementation plan
    - Azure AD OAuth apps implementation plan
- SharePoint Self Service and Provisioning Process Design
    - Methods for users to request new sites
    - Methods to apply branding to newly created sites
- Re-design custom solutions that are still needed or have no equivalent functionality in O365. Please note that Office 365 has many capabilities that can often be substituted for custom SharePoint solutions.

PHASE A: PROJECT MANAGEMENT

DynTek's Project Management Process

Overview

A Project Manager is assigned to all of DynTek's service engagements. The PM is responsible for the on-time and on-budget delivery of services to conform to the project scope. The PM has the following responsibilities:

- **Oversee** the delivery team to ensure people are in the right place at the right time and performing the services requested.
- **Manage** project risks before they become issues that could affect the successful outcome of your services engagement.
- **Communicate** project status to key stakeholders. This is done by maintaining an accessible log of project issues and action items, providing written status reports, and conducting regularly scheduled project status meetings.

Deliverables & Expectations

- Project Workbook containing a communication plan that details the project stakeholders, schedule and format of project status updates, a risks register, an issues log, and project schedule with work breakdown schedule.
- Internal project inception meeting
- Customer inception meeting
- Customer communications plan
- Customer status reporting
- Risk management and mitigation
- Project closure meeting
- Coordination of all required DynTek and customer project resources
- Handling of all required project escalations
- Handling of all required project change orders
- Ensure all project deliverables are completed, signed off on and handed over
- Tracking and approval of all project resource hours

Project Phases and Descriptions

DynTek uses a phased approach for all project delivery. DynTek follows this implementation framework for each of our projects.   Certain key goals are paramount to this framework. These goals include:

- Customer satisfaction
- DynTek employee satisfaction
- Ensuring project timelines are met
- Ensuring all project parties understand the overarching goals, scope and objectives of the project
- Ensuring all project parties understand the success criteria for the project
- Ensuring project escalations are handled in a timely and professional manner

The following constitutes a breakdown of DynTek's project delivery process, with descriptions of the approach for each phase and a brief summary of expected deliverables.

Phase 1: Analyze

Overview

DynTek starts all of its engagements with analysis. The team assigned to your project will perform analysis, both of the current environment and your requirements, as appropriate to the needs of the solution.

Deliverables

Current State documentation will be provided and will deliver an overview of the environment before the implementation of our solution. This document typically contains textual and graphical depictions of logical and physical network topology, rack elevations, configuration backups, IP address schemes, Vlan structure, current environment issues list, current and roadmap applications, as well as other pertinent information.

Phase 2: Design

Overview

Based on the desired solution and understanding of the current state, the project team will develop a design and implementation plan. This is intended to be an interactive phase and will result in comprehensive design documentation, and a plan to efficiently implement the design.

Deliverables

At the conclusion of this phase, DynTek will provide design documentation that specifies the components and configurations expected for the solution. This will include a high-level design utilizing details gathered from the analyze phase. This will be the foundation on which the solution will be built and used as a reference to the proposed outcome of the implementation.

PHASE A: CHANGE MANAGEMENT

Production Change Control

DynTek will not make changes to Client's environment without documenting those changes beforehand, communicating the proposed changes to Client, and receiving prior approval to make the changes. At the outset of the project, Client may elect to provide DynTek with written blanket approval to make production changes, and the conditions under which these changes may be made.

Scope of Services Change Control

DynTek follows a structured methodology with respect to managing unexpected scope changes. DynTek has included in the prior sections all of the steps necessary to accomplish the successful completion of the project; however, Client may decide to change the scope of the project. If items requiring a scope change are identified, the following are the high-level steps that we will follow to discuss these together:

- Discuss and confirm need for additional work
- Identify additional tasks and deliverables associated with the scope change
- Estimate the work effort associated with the additional tasks and deliverables
- Based on the work effort estimate, determine the impact on schedule and budget
- Augment the statement of work with a change request form if the project changes:
    - Require additional resources
    - Affect the project schedule or budget

Any change order signed by DynTek and countersigned by Client will become a binding contract amendment to this statement of work. If a change order thus approved contradicts the signed statement of work (or previous change orders), the most recent change order will govern.

PHASE A: PROGRAM MANAGER

The scope of business transformation programs generally has a multiplicity of requirements, deliverables, customers, stakeholders, departments, and interfacing organizations interacting with the work and is broad and strategic. Program managers are typically the primary driver for business transformation in their organizations. The DynTek program manager will be focused on the following:

- First 30 days will focus primarily on assessment at the program level.
- A wide-ranging well-defined change designed to achieve a strategic business objective for the County of Santa Barbara by the Program Sponsor.
- Engage with stakeholders and use relationships to map future possibilities focused on maximizing long-term value to the organization.
- Incorporate the project schedules at a summary level and manage the gaps and interfaces between the projects.
- Expect undefined risks to occur. Maintain adequate contingencies for future occurrences and seek new opportunities to create value.

PHASE A: – COST OF PROPOSAL

This project is being offered as a Time & Materials engagement. The investment table below outlines the description of each phase, estimated hours, and hourly rate. This cost proposal guarantees no additional fees beyond those proposed will be charged to the County of Santa Barbara without the County's prior written consent. Additional recurring and one-time licenses are presented.

SERVICE FEES

Phase	Estimated Hours	Hourly Rate	Client Investment
Planning and Ongoing Project Management	125	$200	$25,000.00
Phase A1: O365 Analyze	24	$225	$5,400.00
Phase A2: O365Design	80	$225	$18,000.00
Phase A3: SharePoint Migration			
Step 1: SharePoint Migration - Analyze	120	$250	$30,000.00
Step 2: SharePoint Migration - Design	200	$250	$50,000.00
DynTek Sr. Program Manager	160	$225	$36,000.00
Governance Workshop	**40**	**$250**	**$10,000.00**
Travel & Expenses (optional)			**$16,000.00**
TOTAL INVESTMENT:	**749**		**$190,400.00**

TRAVEL EXPENSES

All travel related expenses incurred on behalf of the Client by DynTek during the term of this Agreement and delivery of services shall be reimbursed by Client. Receipts for any such travel expenses shall be provided by DynTek during the invoicing process.

B. PHASE B – IMPLEMENTATION

PHASE B1: IMPLEMENT

Overview

During this phase, the project team will build the solution based upon the agreed upon design. DynTek will perform the build allowing for proper testing, staging, and production change management. At the end of this phase, DynTek will provide as-built documentation specifying the components and configuration of the solution.

Activities

The following activities will be performed during this phase of the project:

DIRECTORY SYNCHRONIZATION / USER ACCOUNTS

This approach uses the free utility, AD Connect from Microsoft to Synchronize Active Directory Accounts with Office 365 – all User accounts, Contacts and Security Groups are synchronized during this process. Adds/Deletes and updates to Office 365 are managed (mastered), directly through Active Directory as well.

Prerequisites

- Forest Functional 2003 or higher Active Directory
- Server 2016/2019 build
- All patches and updates complete
- Cloud Service Account
- Enterprise Administrator Credentials

Activities

- Production Build-Out
    - Addition of servers to the existing Active Directory
    - Configuration of Windows Server 2016/2019 per the design
    - Installation and configuration of Directory Synchronization Services
    - Configuration and test of AD synchronization with Office 365
    - Synchronize User Accounts in Active Directory with Windows Azure Active Directory Services

Deliverables

- Directory Synchronization Services
- User accounts, security groups and contacts created in Office 365
- Password Sync Configured (If Desired)

IDENTITY MANAGEMENT

Prerequisites

- Server 2016/2019 build (x4 for full NLB Configuration)
- All patches and updates complete
- Proxy Services or TMG/ISA front-end if Proxy is required
- Network resource for DNS entries and Firewall configuration
- Certificates (adfs.xxx.xxx) from External CA

Activities

- Production Build-Out
  - Addition of servers to the existing Active Directory
  - Configuration of Windows Server 2016/2019 per the design
  - Installation and configuration of ADFS (Active Directory Federation Services) v3.0
    - Configuration of Interior and Proxy Servers and Services for ADFS

Deliverables

- Active Directory Federation Services / Single Sign-on installation per the design
- 2x ADFS Farm Servers configured in the Interior network and 2x ADFS Proxy Servers configured in the DMZ

HYBRID EXCHANGE 2010/2013 BUILD

This process phase will include the complete setup of the Exchange Server 2010/2013 Hybrid environment. This environment will be implemented to reflect all aspects of the design.

Hybrid is the best practice infrastructure for Office 365 migration, offering complete on-premises to cloud transparency in migration, as well as seamless management of Office 365 Mailbox accounts through the on-premises Hybrid 2010/2013 Exchange Interface.

Prerequisites

- In-place RPC/HTTPS connectivity into Exchange s Environment
- Properly decommissioned Exchange 2003 (or prior) versions from the current environment (if relevant)
- Functional Outlook Anywhere and Outlook Web Access
- User Accounts created in Office 365 via AD Connect
- Single-computer system provisioned with Base 2016/2019 installation
- Exchange 2010 SP3 must be installed

Activities

- Production Build-Out
  - Any required Forest and Domain Schema preparation to Active Directory
  - Updates and patches as recommended by the manufacturer

- Validation of configuration of Exchange Server 2010/2013 “Outlook Anywhere” (RPC/HTTPS) per the design deliverable
- Configuration of Interface between on-premises Exchange and Office 365
- Exchange 2010 SP3 or 2013 SP1 Hybrid Configuration

Deliverables

- Configuration of on-premises Exchange 2010/2013 Hybrid Server (CAS/HUB/MB)
- Configuration of EOP routing connectors (Send and Receive)
- Updated Design Documentation
- As-Built documentation
- At the conclusion of this phase, DynTek will provide as-built documentation specifying the components and configuration of the solution

MIGRATION WIZ CONFIGURATION

Overview

Because some users who own mailboxes in the Exchange environment are located in an accounts forest model (using Linked Accounts), Hybrid migration is not possible. For these ~900 user accounts, their mail will be migrated using the Bit Titan Migration Wiz tool instead of Hybrid. This process is generally done in the form of a cutover, in that the mail system represented here cannot be put in Hybrid mode, and thus, cannot share the same type of mail forwarding and namespace sharing process that typical Hybrid can.

Prerequisites

- Both the Source and the Destination systems must be functional, and mailboxes must exist on both Source and Destination.

Prepare Source Environment (Exchange 2013)

- Enable OAuth administrative credentials at source
    - Note: OAuth administrative credentials will not function properly with Google Apps for Business Legacy free accounts. If a Google Apps tenant is a Google Apps for Business Legacy free account, end user credentials must be used.
- Prepare Destination Office 365 Environment
    - Create an administrator account in Office 365, to be used for migration (or use the global admin account for the tenant).
    - Set up accounts on Office 365, and assign licenses
    - Configure Application Impersonation role
- Configure MigrationWiz
    - Create the mailbox migration project(s)

- Import users into the project
- Run Assessment to calculate number of licenses required for migration
- Customize the project, using Advanced Options
- Set to use impersonation at Destination. Checkmark box Use impersonation at Destination
- Purchase licenses
- Run Pre-Stage Migration. Develop test cases with client input
- Develop test plans and scripts
- Execute tests
- Review test results with client personnel
- Remediate any defects in the solution and re-execute tests

Deliverables

At the conclusion of this phase, DynTek will provide as-built documentation specifying the components and configuration of the solution, all artifacts that were created during testing, and a final statement indicating that the solution is ready for deployment and requesting client approval for deployment.

AZURE ACTIVE DIRECTORY IDENTITY MANAGEMENT AND MULTI-FACTOR AUTHENTICATION DEPLOYMENT

- Review and configure Multi-Factor Authentication
  - Configure for base logins to cloud systems
  - Review process for on-premises MFA deployment
    - ***NOTE: this engagement does cover deployment of on-prem MFA***
  - Configure up to 5 applications for MFA, governed by Conditional Access
    - Define Application in Enterprise Applications
    - Define Conditional Access Policies and Thresholds
    - Configure Conditional Access Per application based on policies and thresholds
- Review objectives for Identity Risk Management and thresholds for elevated Risk
  - Configure Identity Risk controls and associated Conditional Access
- Configure Conditional Access for SharePoint Online, Exchange Online and Skype for Business Online, One Drive for Business and Teams
  - Note: Requires Azure Active Directory Premium P1 or P2

Deliverables

- Updated as-built documentation showing the complete configuration of the solution in a production environment
- Governance and data protection checklist and operational documentation

- Configuration of the following systems:
  - Azure Active Directory Plan 1 or Plan 2
    - Conditional Access with MFA
    - Identity analytics and risk assessment

OFFICE 365 SECURITY AND COMPLIANCE CONFIGURATION

Activities

The following activities will be performed during this phase of the project:

- Develop Activation Plan and Roadmap
- Develop Activation Strategy

COMPLIANCE POLICY CONFIGURATION AND ENFORCEMENT

- Review and configure Record Retention Policy and Processes
- Review and configure Email Retention Policy Processes
- Configure Conditional Access for SharePoint Online, Exchange Online and Skype for Business Online
  - ***Note: Requires Azure Active Directory Premium P1 or P2***
- Integrate Proofpoint Enterprise, Proofpoint TAP, and Proofpoint TRAP with Exchange Online
  - ***NOTE: use of Proofpoint Cloud-based approach is highly recommended, due to the High Availability characteristics of cloud-only vs. on-prem use of these systems***
- eDiscovery process review and definition of cases
  - Initial Retention Policy configuration
- Develop and Configure Data Loss Prevention Policies
  - One Drive for Business
  - Exchange Online
  - SharePoint
  - Secure messaging configuration
  - Anti-SPAM and Anti-Malware configuration for Exchange EOP
  - Configuration of role-based access control (RBAC) for DLP, eDiscovery and security management and configuration
- Preparation of reports for usage, performance and service health metrics
- Preparation of reports for auditing of administrative activities, including provisioning and de-provisioning, compliance/e-discovery activity, and configuration changes

- Schedule and conduct knowledge transfer sessions as needed with client personnel to ensure client readiness to assume responsibility for the solution
- Office 365 Adv. Threat Protection
    - Safe Links
    - Safe Attachments
    - Analytics/Threat Intelligence
- Review Advanced Security Management and Alerts

PHASE B2: TEST & STAGE HYBRID MIGRATION ACCOUNTS (LOCAL FOREST)

Overview

During this phase, the project team works with the client's team to develop test cases and test scripts/plans to fully vet the solution in a production environment. The result of this phase is a fully tested solution that meets the objectives of the project and is ready to be moved into a production environment.

Activities

The following activities will be performed during this phase of the project:

MIGRATION PILOT

Prerequisites

- In-place RPC/HTTPS connectivity into Exchange 2010/2013 Environment
- Functional Outlook Anywhere and Outlook Web Access
- User Accounts created and licensed in Office 365 via AD Connect
- Exchange 2010 SP3 or 2013 SP1 installed
- Exchange Hybrid Installed and Tested

Migration Activities

- Migration Planning
- Migration of 25 Pilot users from the production messaging environment (Exchange on-premises to Exchange Server in Office 365 Environment)
- Development (if required) of PowerShell scripting and materials to support production migration
- Validation of Coexistence Environment
- Knowledge Transfer

Deliverables

- Any required scripts and/or materials to support production migration
- Migration of 25 users to the production messaging environment (Exchange to Exchange)

- Knowledge Transfer
- At the conclusion of this phase DynTek will provide all artifacts that were created during testing, along with a final statement indicating that the solution is ready for deployment and requesting client approval for deployment.

TEST & STAGE EXTERNAL FOREST ACCOUNTS (CUTOVER PREP)

Overview

During this phase, the project team works with the client's team to develop test cases and test scripts/plans to fully vet the solution in a production environment. The result of this phase is a fully tested solution that meets the objectives of the project and is ready to be moved into a production environment.

CUTOVER MIGRATION STAGING

Prerequisites

- User Accounts created and licensed in Office 365 via AD Connect

Activities

- Cutover Staging - User Preparation
  - Gather Resource Contacts & Availability
  - Develop Deployment Plan with Administrators
  - Communicate timing, training, and support plan for the installation
  - Train IT community, as appropriate, on the platform
  - Install prerequisites
  - Install and configure client information/programs
  - Install and configure client support programs/utilities
  - Patch software as necessary
  - Input Distribution Lists
  - Verify New SMTP Domain (s)
  - Set as Default Domain (External Relay if Coexistence)
- Review Client change with local mail/site administrators
  - Briefing with each top-level admin on process to cutover
  - Review future-state mail system and operational aspects
  - Review factors critical to success
  - Develop action plan specific to each type/site
  - Deploy new clients where required
  - Determine client types requirements
  - Contact and review deployment mechanism with top-level mail/site administrators
  - Schedule new client install
  - Install new client

    - Train Users on New client use
- Test new accounts (old mail still running)
    - Request pilot group at each site login and test new email
    - Collect results
    - Remediate where necessary
- Determine schedule for Mail Cutover Per Site/Admin
- Test and pilot Notes email requirements and interface
    - Review Notes systems email requirements for support services/applications
    - Reconfigure to use Office 365 Mail system
    - Test and validate
- Assist Client with crafting user communications and establishing notification cadence
- Review cutover schedules with site/email system admin
- Review resource requirements and availability
- Schedule cutover
- Review cutover process with resources
- Hold "Go/No Go" meeting immediately prior
- Knowledge Transfer

Deliverables

- Any required scripts and/or materials to support production migration
- Configuration Guide for User Configuration
- Knowledge Transfer
- At the conclusion of this phase DynTek will provide all artifacts that were created during testing, along with a final statement indicating that the solution is ready for deployment and requesting client approval for deployment.

PHASE B3: DEPLOY - EMAIL SYSTEMS MIGRATION

Overview

During this phase, the project team moves the solution into a production state. DynTek requires all production deployments to be authorized by its clients in writing, and the preference is to adhere to clients' change management processes. The result of this phase is a solution that has been deployed to a target production environment and is considered operational.

During this phase, DynTek will also conduct knowledge transfer. This is accomplished both informally by working side-by-side with our client's personnel, as well as formally through a series of review sessions where the as-built solution is reviewed.

Activities

The following activities will be performed during this phase of the project:

PRODUCTION MIGRATION – HYBRID ACCOUNTS

Prerequisites

- In-place RPC/HTTPS connectivity into Exchange 2010/2013 Environment
- Functional Outlook Anywhere and Outlook Web Access
- User Accounts created and licensed in Office 365 via AD Connect
- Exchange 2010 SP3 or 2013 CU1 installed
- Exchange Hybrid Installed and Tested
- Successful Pilot Migration

Migration Activities

- Migration of remaining users, from the production messaging environment (Exchange on-premises to Exchange Server in Office 365 Environment)
- Development (if required) of PowerShell scripting and materials to support production migration
- Final updates to as-built documentation
- Schedule and conduct knowledge transfer sessions as needed with client personnel to ensure client readiness to assume responsibility for the solution.

Deliverables

- Any required scripts and/or materials to support production migration
- Migration of remaining users to the production messaging environment (Exchange to Exchange Online)
- Knowledge Transfer
- Updated as-built documentation showing the complete configuration of the solution in a production environment

PRODUCTION MIGRATION – REMOTE FOREST ACCOUNTS (CUTOVER)

Activities

The following activities will be performed during this phase of the project:

PRODUCTION CUTOVER

Prerequisites

- User Accounts created and licensed in Office 365 via AD Connect
- User Communications and notifications for cutover process complete

Migration Activities

- Cutover to Office 365
- Cutover Site and Enable Inbound Messaging (MX record triggers change to online)
  - Cutover each site/mail system at pre-determined date and time using pre-determined resources

- Modify MX records per site for mail system to redirect to cloud
    - Verify readiness after cutover
    - Put new system into production
    - Validate Migration
    - Verify migrated accounts
    - Complete Post-migration Tasks
- Development (if required) of PowerShell scripting and materials to support production migration
- Final updates to as-built documentation
- Schedule and conduct knowledge transfer sessions as needed with client personnel to ensure client readiness to assume responsibility for the solution.

Deliverables

- Cutover Migration to Office 365
    - MX cutover
    - Autodiscover Configuration
    - User accounts and mail flow for production in Office 365
- Any required scripts and/or materials to support production migration
- Knowledge Transfer
- Updated as-built documentation showing the complete configuration of the solution in a production environment
- Day 1 and Day 2 support and follow-up with customer issues, staging, migration cleanup, etc.

PUBLIC FOLDER MIGRATION

- Identify folders larger than 19GB to reduce size/split/exclude
- If the PF structure contains more than 100 folders, reduce their size
- Exchange Online public folders mailbox creation
- Configure Exchange on-premises for shared access with Cloud-based accounts (during migration)
- Configure Organizational focus for Cloud-based Public Folders (On-Prem)
- Post Mailbox Migration
    - Migrate Public Folders
    - Lock down PF on the source server and finalize synchronization with Exchange Online
    - Validate migration
    - Unlock public folders
    - Configure Organizational focus for Cloud-based Public Folders (Cloud)
    - Remove public folder databases from the source server

Deliverables

- User Communication Plan
- Any required scripts and/or materials to support production migration
- Migration of public folders

PHASE B4 – SKYPE FOR BUSINESS TO TEAMS MIGRATION

Overview

This phase will allow DynTek's Skype for Business experts to configure Skype for Business / Teams Online, standardize procedures and processes, replicate the on-premises environment and migrate content from the on-prem system to Skype for Business / Teams online. Skype for Business Online will be retired on July 31, 2021, after which it will no longer be accessible or supported.

It is our assumption, based on Microsoft published requirements, that if Phone System in the Office 365 Cloud will be used for functions such as Auto Attendant, Call Groups, etc. for the on-premises phone system, in effect to replace the current Exchange Unified Messaging role, that the on-premises Skype for Business system has fully telephonic integration with the on-premises PBX system. Since Auto Attendant, etc. must originate in Office 365 Phone System and connect down through Skype for Business on-prem, in order to answer calls for the PBX, this telephonic interface must be completely integrated.

Infrastructure Prerequisites

The following must be available in the environment in order to implement and configure a Skype for Business Server 2015 hybrid deployment.

- An Office 365 tenant with Skype for Business Online / Teams enabled.
- Optionally, to support Single Sign-on with Office 365, an Active Directory Federation Services (AD FS) Server
- An on-premises deployment of Skype for Business Server 2015.
- Skype for Business Server 2015 administrative tools.
- Directory Synchronization.

Activities

- Planning and Design for Migration
  - Plan User Communications and Training initiatives
  - Plan for Configuration of Hybrid connectivity
  - Design for Phone System configuration for Auto Attendant, Call Queues, etc.
  - Review of the Active Directory infrastructures
  - Skype for Business Hybrid Envisioning, Planning, and Design

        - Review of the current Skype for Business environment
        - Review of the goals required and expectations of the migration/configuration
        - Design migration process and hybrid configuration, including any required hardware, software, routing, and integration with Skype for Business Online and Teams
        - Design for the current users to migrate to Skype for Business Online or Teams
            - Migration process
            - User Communications
- Implementation of Hybrid SfB
    - Configure on-premises environment to federate with Office 365
        - Configure on-premises Edge service to federate with Office 365
        - Configure trust for on-premises environment and Office 365
        - Enable shared SIP address space with Office 365 (if required)
    - Configure OAuth between Exchange on-premises and Skype for Business/Teams Online
    - Set transitional coexistence mode (optional)
    - Move users from Skype for Business on-premises to Teams Only
    - Configure Phone System and Teams upgrade for PBX interoperability
    - Configure Dial-in conferencing (requires additional licensing in Office 365)
        - Configure Dial-in conferencing numbers
        - Assign Conferencing Numbers to user accounts

Deliverables

- User Communication Plan
- Any required scripts and/or materials to support production migration
- Users migrated from On-prem Skype for Business to Skype for Business / Teams Online
- Microsoft Phone System configuration for Auto Attendant, Call Queues, etc. per design

PHASE B5: – SHAREPOINT MIGRATION

Step 3 – Implement

Activities may include the following based on customer needs:

- Create Site Collection and Sites as required to support decision around functionality (pilot)
- Configure features as required
- Deploy custom solutions as required
- Develop Operations Plan

- Site Template Design
- Site and library permissions
- Install ShareGate and prepare for migration
- Install Metalogix Content Matrix and prepare for migration
    - Analysis of Content
    - Identification of migration issues
    - Detailed estimate of time required for migration
    - Build migration jobs and test

Step 4 Migrate/Deploy

- Setup and configure SharePoint online
- Create necessary site collections required by design
- Create webs in classic model site collections if needed
- Setup permissions for each site and site collection
- Setup document libraries
- Setup custom list
- Setup additional list
- Migration of data from on premises SharePoint to SharePoint Online

    NOTE: migration of custom lists will require 3rd party migration software, cost of which is not included in this Statement of Work.

Deliverables

- Site Collections and Sites configured to accommodate migration of content
- Document libraries created and permissions applied according to on-prem schema
- Content migrated from On-prem system to SharePoint Online

PHASE B6: OFFICE PRO PLUS CONFIGURATION AND TESTING USING SCCM

Overview

During this phase, the project team works with the client's team to develop test cases and test scripts/plans to fully vet the solution in a production environment. The result of this phase is a fully tested solution that meets the objectives of the project and is ready to be moved into a production environment.

This phase will not deploy Office Pro Plus, but will, per scoping requirements, "Prepare latest version of Office Pro Plus Suite installer for all County computers".

NOTE: The tasks enumerated below assume that a Client-provided System Center Configuration Manager installation is in place, can support software deployment to client workstations, and is sufficiently patched/updated to support the deployment of Office Pro plus. Varying versions of SCCM provide various feature sets. It is recommended that SCCM be brought to current level 1906 or 1910 for the best experience. Read more here:

https://docs.microsoft.com/en-us/sccm/sum/deploy-use/manage-office-365-proplus-updates

Activities

The following activities will be performed during this phase of the project:

Prerequisites

- User Accounts created in Office 365 via AD Connect
- SCCM Current Branch (preferably 1906 or newer), minimum installation in place at customer location
    - System capable of software deployment to desktops

Deployment Activities

- Office ProPlus Deployment Planning
- Activation of User accounts via PowerShell scripting
- Development of Office Pro Plus Deployment packaging using SCCM
    - Configure .XML for deployment
    - Develop/download and stage binaries
    - Develop GPO's for deployment to workstations
- Office ProPlus Deployment Testing and Validation
    - Removal of existing Office 2016 key-based installation
    - Installation of Office Pro Plus
- Development (if required) of PowerShell scripting and materials to support production Office ProPlus Deployment
- Knowledge Transfer

Deliverables

- Any required scripts and/or materials to support production Office ProPlus Deployment
- Office ProPlus Deployment of 375 users
- Knowledge Transfer
- At the conclusion of this phase DynTek will provide all artifacts that were created during testing, along with a final statement indicating that the solution is ready for deployment and requesting client approval for deployment.

PHASE B7: DECOMMISSION OF LEGACY EXCHANGE CONNECTIONS

Overview

The objective of this phase is to decommission the old email environment.

NOTE: As per above discussions, Unified Messaging is no longer supported in Exchange 2019, or in Exchange Online. Therefore, the role of UM must be configured to use a combination of "Phone System" in Office365, connecting through on-premises Skype for Business, which must have full telephony integration direction into the on-prem PBX/Phone system.

If this integration does not exist, Unified Messaging cannot be accomplished from the cloud-based Phone System. Integration of these systems is not in the scope of this proposal, and thus, it is our recommendation that consideration be given to leaving the on-premises Exchange System in-place, (which is also Microsoft's recommended best practices for a Hybrid Exchange environment that synchronizes AD with Azure AD.. see here: https://docs.microsoft.com/en-us/exchange/decommission-on-premises-exchange#why-you-may-not-want-to-decommission-exchange-servers-from-on-premises), until such time as a complete, integrated end-to-end phone strategy can be deployed.

Activities

- Decommission legacy Exchange, Skype for Business and SharePoint environments.
  - Legacy Exchange server's disconnection from email flow
  - Legacy Exchange server removal of connectors from tools and any from native Exchange
  - Cleanup email folder remnants
  - Cleanup user databases
- Cleanup any remnants from Active Directory
  - Including routing configurations
  - Domain groups – if applicable
  - Test environment after decommissioning
- Configure SMTP Relay for Secure SMTP
  - Determine Devices used for SMTP Relay
  - Configure IIS SMTP on Windows Server
  - Configure Domain for Office 365 domain as a remote domain
  - Configure and update IP address of the server used for SMTP – the local server
  - Create Account in Office 365 as secure login account
  - Configure PORT 587
  - Validate and Test for Secure SMTP to Office 365 Recipient

Deliverables

- Remove Legacy Exchange from the email flow and other areas
- Cleanup Active Directory from any remnants
- Testing final configuration after decommissioning for any issues
- SMTP Secure redirection configured for Office 365

- Decommission and cleanup of on-premises Exchange resources, SharePoint (if applicable) and Skype for Business servers
    - ***NOTE: SfB servers will be required on-prem to maintain UM with on-prem phone systems if Exchange Server is decommissioned***

PHASE B8: COREVIEW DEPLOYMENT

DynTek will host a structured working session with the Customer to accomplish the following tasks:

- Initiate the collection/import process of Office 365 metadata into DynTek
- Create Office 365 Portal "tile" providing hyperlink to training materials
- Re-Direct Office 365 help link to training materials
- Instruct in the configuration and editing of defined learning paths
- Validate Configuration
- Delegated Role Based Administration
- License Assignment and Accounting
- End User Training
- End User Adoption Tracking
- Hybrid Management

Hands on Training

DynTek will guide the customer through an examination of the data collected by the product, and in doing so provide hands on training of the operation of the product and its various elements.

1. Adoption Campaigns: Start by using targeted reporting to find which users are failing to use specific services. Then create an automated education and tracking workflow to deliver training materials, track messages read & click through rates, and finally tie it all back to increases in adoption and service consumption.
2. Role Based Access Control: DynTek allows you define access to information and actions based on the job function of the person accessing the console. This allows you to give the regional administrator in Chicago access to only the objects in that office, while the finance manager only has the ability to view licensing and service usage reports. Meanwhile a high-level administrator is allowed to make only specific changes to defined users.
3. License Pool: Directly tie license allocation to specific business units. This allows you to ensure that the marketing department is limited to using the 30 licenses allotted to them. Should they hire new employees, DynTek will show that their licenses have been

consumed, helping to drive home the need to “true up” internally before new licenses are purchased.

4. Delegation with V-Tenants: Define management and reporting tasks by automatically segmenting your enterprise based on specific groupings, such as department. Once segmented, address management and licensing concerns based upon the groupings.
5. Audit User Activity: Analyze user activity in detail as they interact with Office 365 on a daily basis. Narrow the scope of events either per user or per service to find access times, document names, and specific activities such as sharing access with external users.
6. User Card: Comprehensive single collection of all viewable information and managements tasks on a per user basis. Using the single pane of glass allows for all management actions to be performed quickly and efficiently, regardless of workload. Review accounts, or make active changes to their licensing or services, on the fly.
7. Service Usage Reporting: 125+ reports delving into all aspects of your Office 365 tenant. See in detail how your users are using Office 365 and see where your users need help in terms of consuming lesser used workloads. Where needed, reallocate licensing to more appropriate tiers of service. Reports available for Exchange Online, SharePoint Online, Skype for Business, OneDrive for Business, Office Pro Plus, Mobile Devices, & Yammer.
8. On Event Alerting: Send email alert notifications when events are generated pertaining to OneDrive for Business or SharePoint Online. Documents created, deleted, modified, or accessed can be used to inform the alerts. Even specific SharePoint Online site visitations.
9. Bulk Action: Execute coordinated activities against massive amounts of users with a single command. Reduce errors by streamlining repetitive processes.

Adoption Campaign Configuration

Once 10 business days of metric data have been collected by the automated processes, the project team will gather to perform configuration of adoption campaigns using the most up to date information. All present consumption levels will be cataloged and recorded. Working together to scan through the collection of data, the project team will identify suitable collection of pilot users (not to exceed five hundred (500)), against which to initiate adoption campaigns.

These users will be selected based on their challenges in adopting one specific workload deemed critical by Client. Using the available video-based training materials, the project team will create multiple messages to send out on a staggered basis. Each email will comprise a distinct campaign and the project team will leverage the real time updates to test the response of each communication. This communication wireframe will be leveraged for future messaging efforts as the campaigns are extended.

Review of Changes in Consumption for Pilot users

5 business days after adoption communications have been sent, project team will gather to review and collect updated usage trends for the targeted adoption pilot users, comparing their results to users not targeted. This information will serve as the foundation for the final report. The final report will be augmented with any further findings resulting after a total of 10 business days, post campaign initiation.

Finding of Facts

Using the gathered information from the project, DynTek will provide a report showing the initial state of the environment with respect to the collected data as well as report on the net effect of the consumption effort made against targeted pilot users. The report will include recommendations on expanding the adoption effort outside of targeted pilot users. Also included will be suggestions on how to leverage the other functions of DynTek for the balance of the 90-day work period.

PHASE B9: USER TRAINING

End-user training (Train the Trainer)

Training Overview

DynTek will conduct up to eight (8) 2-hour sessions. Each session will be attended by relevant participants. Instruction will either use their live Office 365 accounts or test accounts provided by DynTek to allow performance of actions discussed in class.

Course Outline

- Introduction to Outlook Web App/Office 365
- Sign into Outlook Web App
- Email
    - What you'll see in Mail
    - Create a new message
    - Working with drafts
    - Reading Pane
    - Open a message in a separate window
    - Deleted messages
    - Folder list
    - Message list
    - Junk email folder
    - Search and built-in filters
- People (Contacts)
    - What you'll see in People
    - Create a new contact
    - Create a group

- Create a shared group
- Create a contact from a message
- Edit a contact
- Linking and unlinking contacts
- Can I share a contacts folder with other people from Outlook Web App?

- Calendar
  - What you'll see in Calendar
  - Create a calendar item
  - Modify or delete a calendar event
  - Share your calendar

Administrative training

Training Overview

DynTek will conduct up to six (6) 4-hour sessions. Each session will be attended by relevant participants. Instruction will either use their live Office 365 accounts or test accounts provided by DynTek to allow performance of actions discussed in class.

Course Outline

- **SPAM configuration**
  - Configuration of SPAM filtering using EOP
  - Integration of SPAM filtering in Office 365 with Barracuda SPAM filter on-premises
- **Administration of Office 365**
  - **OFFICE 365 SERVICES OVERVIEW**
    - Overview of Office 365 services
    - Office 365 licensing overview
    - Office 365 tenant configuration
    - Office 365 clients
  - **OFFICE 365 ADMINISTRATION, TOOLS, AND TECHNIQUES**
    - Managing Office 365 with administrative portals
    - Managing Office 365 with Windows PowerShell
    - Managing administrative access in Office 365
  - **ADMINISTERING DIRECTORY SYNCHRONIZATION AND DIRECTORY OBJECTS**
    - Directory synchronization and federation overview
    - Azure AD Connect management
    - Managing users and groups objects in Office 365
  - **ADMINISTERING MICROSOFT EXCHANGE ONLINE**
    - Overview of Exchange Online management
    - Administering Exchange Online recipients
    - Administering client access policies in Exchange Online
  - **ADMINISTERING COMPLIANCE AND SECURITY IN OFFICE 365**
    - Overview of compliance features in Office 365

- Administering Azure Rights Management in Office 365
- Administering compliance features in Office 365
- Configuring and administering email security in Office 365

PHASE B10: DSS AD MIGRATION

PHASE 1: ANALYZE

Overview

DynTek starts all of its engagements with analysis. The team assigned to your project will perform analysis, both of the current environment and your requirements, as appropriate to the needs of the solution.

Activities

The following activities will be performed during this phase of the project:

Client Environment Discovery

It is important at the outset of the deployment project to gather and capture information about the existing IT environment. Discovery activities provide a comprehensive and up-to-date record of the technology solutions implemented by our organization.

This process involves gathering information in the following areas:

- On-premises infrastructure servers and components
- Review Active Directory Forest integration and identification
- Network architecture and DNS
- Authentication solutions
- Bandwidth
- Certificates
- Hardware and software
- Review AD Synchronization (AD Connect) installation

Deliverables

Current State documentation that provides an overview of the environment before the implementation of our solution. This document typically contains textual and graphical depictions of logical and physical network topology, rack elevations, configuration backups, IP address schemes, Vlan structure, current environment issues list, current and roadmap applications, as well as other pertinent information.

PHASE 2: DESIGN

Overview

Based on the desired solution and understanding of the current state, the project team will develop a design and implementation plan. This is intended to be an interactive phase and will result in comprehensive design documentation, and a plan to efficiently implement the design.

Activities

The following activities will be performed during this phase of the project:

- Develop Migration Plan and Roadmap
- Develop Designs for AD Connect integration
- Design for Active Directory Migration and Consolidation installation and configuration

Deliverables

At the conclusion of this phase, DynTek will provide design documentation that specifies the components and configurations expected for the solution. This will include a high-level design utilizing details gathered from the analyze phase. This will be the foundation on which the solution will be built and used as a reference to the proposed outcome of the implementation.

PHASE 3: ACTIVE DIRECTORY MIGRATION BUILD AND TEST

Overview

During this phase, the project team will build the solution based upon the agreed upon design. DynTek will perform the build allowing for proper testing, staging, and production change management. At the end of this phase, DynTek will provide as-built documentation specifying the components and configuration of the solution.

The following activities will be performed during this phase of the project:

Active Directory Migration Services (ADMT) Build/Configuration
Overview

During this phase, the project team will build the Active Directory Migration Services portion of the solution based upon the agreed upon design. This build out will include the complete setup of the required migration tools and coexistence components needed for migration process for each of the sites in the Pilot. At the end of this phase, DynTek will provide as-built documentation specifying the components and configuration of the solution.

Activities

Build out and configuration of migration tools

- Prepare the source and target domains. This task has the following subtasks:
    - Install 128-bit encryption software.

- Establish trusts that are required for migration.
- Establish migration accounts for the migration.
- Configure the source and target domains for security identifier (SID) history migration.
- Configure the target domain organizational unit (OU) structure.

- Install ADMT in the target domain
  - Download SQL Server Express
  - In the ADMT download package, double-click admtsetup32.exe.
  - Ensure that the recommendations are completed
  - License Agreement process
  - Select Database
  - Review Summary page, review the results of the installation
- Specify service accounts for the migration

Deliverables

- Build out of the physical and/or virtual servers required for Active Directory migration:
  - Installation and Configuration of ADMT for Active Directory migration
  - Updated As-Built Documentation detailing the items deployed during this phase
  - Installation and configuration of Active Directory servers and support services at each remote location

PILOT MIGRATION

Overview

During this phase, the project team works with the client's team to develop test cases and test scripts/plans to fully vet the solution in a production environment. The result of this phase is a fully tested solution that meets the objectives of the project.

This process will be done in coordination with the Exchange Cross-Forest mail migration in a process that migrates mailboxes first to the Target Forest, then migrates/updates the original user account and/or workstation from Source to Target forest, connecting the resource to the Target Active Directory while the mail is migration from Source Forest to Target Forest (2010 to 2016 Exchange) and finally to Office 365 via Exchange 2016 Hybrid.

Active Directory Pilot Migration

A pilot migration will be performed to ensure the new environment functions as designed and to ensure it provides the desired results. The pilot group of up to 3 sites will be selected by the implementation team to represent a cross section of the final deployment.

NOTE: The pilot migration will be leveraged to test functionality during the project and to gain a better understanding of how long it will take to complete the production deployment specific to the client's environment (Server Hardware Performance, LAN performance and Internet Circuit Performance).

A utility from Forensit, User Profile Wizard, exists to script the manual movement/migration of the profile information post-migration:

https://www.forensit.com/domain-migration.html

Activities

The following activities will be performed during this phase of the project:

- Pilot implementation
- Pilot group documentation preparation
- Test of Migration Processes for the following designated groups of accounts/systems:
- Migration from Active Directory Source to Active Directory target locations
    - User Account Migration Reconciliation / Profile Management
        - Construct "Include File" for merge
        - Using Merge Function for User accounts
        - Using Forensit Tool to migrate AD workstation profile and Outlook profile for each user account
    - Computer Account Migration
- Knowledge Transfer to Client's Team
- Testing of Migration times (i.e. number of profiles migrated per hour)
- Update the design deliverable as required
- Update migration configuration processes as required
- Testing of pilot population end user experience and functionality

Deliverables

- User pilot for user accounts and workstations
- Migration process refinement for production migration

PHASE 4: ACTIVE DIRECTORY PRODUCTION MIGRATION

The production migration will be performed. The production group of all remaining sites will be selected by the implementation team to complete the final deployment. This process will be done in coordination with the Exchange Hybrid mail migration in a process that migrates mailboxes first to Office 365, then migrates the original user account from Source to Target forest, connecting the account to the Azure AD system via a soft-match/hard-match process.

Activities

The following activities will be performed during this phase of the project:

- Pilot implementation
- Pilot group documentation preparation
- Test of Migration Processes for the following designated groups of accounts/systems:
- Migration from Active Directory Source to Active Directory target locations
    - User Account Migration Reconciliation / Profile Management
        - Construct "Include File" for merge
        - Using Merge Function for User accounts
        - Using Forensit Tool to migrate AD workstation profile and Outlook profile for each user account
    - Computer Account Migration
- Knowledge Transfer to Client's Team
- Testing of Migration times (i.e. number of profiles migrated per hour)
- Update the design deliverable as required
- Update migration configuration processes as required
- Testing of pilot population end user experience and functionality

Deliverables

- User pilot for user accounts and workstations
- Migration process refinement for production migration

PHASE B: PROJECT MANAGEMENT

DynTek's Project Management Process

Overview

A Project Manager is assigned to all of DynTek's service engagements. The PM is responsible for the on-time and on-budget delivery of services to conform to the project scope. The PM has the following responsibilities:

- **Oversee** the delivery team to ensure people are in the right place at the right time and performing the services requested.
- **Manage** project risks before they become issues that could affect the successful outcome of your services engagement.

- **Communicate** project status to key stakeholders. This is done by maintaining an accessible log of project issues and action items, providing written status reports, and conducting regularly scheduled project status meetings.

Deliverables & Expectations

- Project Workbook containing a communication plan that details the project stakeholders, schedule and format of project status updates, a risks register, an issues log, and project schedule with work breakdown schedule.
- Internal project inception meeting
- Customer inception meeting
- Customer communications plan
- Customer status reporting
- Risk management and mitigation
- Project closure meeting
- Coordination of all required DynTek and customer project resources
- Handling of all required project escalations
- Handling of all required project change orders
- Ensure all project deliverables are completed, signed off on and handed over
- Tracking and approval of all project resource hours

Project Phases and Descriptions

DynTek uses a phased approach for all project delivery. DynTek follows this implementation framework for each of our projects. Certain key goals are paramount to this framework. These goals include:

- Customer satisfaction
- DynTek employee satisfaction
- Ensuring project timelines are met
- Ensuring all project parties understand the overarching goals, scope and objectives of the project
- Ensuring all project parties understand the success criteria for the project
- Ensuring project escalations are handled in a timely and professional manner

The following constitutes a breakdown of DynTek's project delivery process, with descriptions of the approach for each phase and a brief summary of expected deliverables.

Phase 1: Analyze

Overview

DynTek starts all of its engagements with analysis. The team assigned to your project will perform analysis, both of the current environment and your requirements, as appropriate to the needs of the solution.

Deliverables

Current State documentation will be provided and will deliver an overview of the environment before the implementation of our solution. This document typically contains textual and graphical depictions of logical and physical network topology, rack elevations, configuration backups, IP address schemes, Vlan structure, current environment issues list, current and roadmap applications, as well as other pertinent information.

Phase 2: Design

Overview

Based on the desired solution and understanding of the current state, the project team will develop a design and implementation plan. This is intended to be an interactive phase and will result in comprehensive design documentation, and a plan to efficiently implement the design.

Deliverables

At the conclusion of this phase, DynTek will provide design documentation that specifies the components and configurations expected for the solution. This will include a high-level design utilizing details gathered from the analyze phase. This will be the foundation on which the solution will be built and used as a reference to the proposed outcome of the implementation.

PHASE B: CHANGE MANAGEMENT

Production Change Control

DynTek will not make changes to Client's environment without documenting those changes beforehand, communicating the proposed changes to Client, and receiving prior approval to make the changes. At the outset of the project, Client may elect to provide DynTek with written blanket approval to make production changes, and the conditions under which these changes may be made.

Scope of Services Change Control

DynTek follows a structured methodology with respect to managing unexpected scope changes. DynTek has included in the prior sections all of the steps necessary to accomplish the successful completion of the project; however, Client may decide to change the scope of the project. If items requiring a scope change are identified, the following are the high-level steps that we will follow to discuss these together:

- Discuss and confirm need for additional work
- Identify additional tasks and deliverables associated with the scope change
- Estimate the work effort associated with the additional tasks and deliverables
- Based on the work effort estimate, determine the impact on schedule and budget
- Augment the statement of work with a change request form if the project changes:
    - Require additional resources
    - Affect the project schedule or budget

Any change order signed by DynTek and countersigned by Client will become a binding contract amendment to this statement of work. If a change order thus approved contradicts the signed statement of work (or previous change orders), the most recent change order will govern.

PHASE B: PROGRAM MANAGER

The scope of business transformation programs generally has a multiplicity of requirements, deliverables, customers, stakeholders, departments, and interfacing organizations interacting with the work and is broad and strategic. Program managers are typically the primary driver for business transformation in their organizations. The DynTek program manager will be focused on the following:

- First 30 days will focus primarily on assessment at the program level.
- A wide-ranging well-defined change designed to achieve a strategic business objective for the County of Santa Barbara by the Program Sponsor.
- Engage with stakeholders and use relationships to map future possibilities focused on maximizing long-term value to the organization.
- Incorporate the project schedules at a summary level and manage the gaps and interfaces between the projects.
- Expect undefined risks to occur. Maintain adequate contingencies for future occurrences and seek new opportunities to create value.

PHASE B: COST OF PROPOSAL

This project is being offered as a Time & Materials engagement. The investment table below outlines the description of each phase, estimated hours, and hourly rate. This cost proposal guarantees no additional fees beyond those proposed will be charged to the County of Santa Barbara without the County's prior written consent. Additional recurring and one-time licenses are presented.

SERVICE FEES

Phase	Estimated Hours	Hourly Rate	Client Investment
Planning and Ongoing Project Management	375	$200	$75,000.00
Phase B1: Implement	80	$225	$18,000.00
Phase B2: Test and Stage (Pilot)	200	$225	$45,000.00
Phase B3: Deploy	320	$225	$72,000.00
Phase B4: Skype For Business to Teams Migration	120	$225	$27,000.00
Phase B5: SharePoint Migration	n/a	n/a	n/a
Step 3: SharePoint Migration - Implement	160	$250	$40,000.00
Step 4: SharePoint Migration - Migrate	160	$250	$40,000.00
Phase B6: Office Pro Plus Deployment Configuration and Testing	24	$225	$5,400.00
Phase B7: Decommission Legacy Exchange	24	$225	$5,400.00
Phase B8: CoreView Deployment	40	$225	$9,000.00
Phase B9: Training [Fixed Price]	n/a	n/a	$20,000.00
Phase B10: DSS AD Migration	222	$225	$50,000.00
DynTek Sr. Program Manager	1920	$225	$432,000.00
Post-Production Support:	80	$225	$18,000.00
Customer Immersion Experience (CIE) workshop	n/a	n/a	$2,500.00 each
Travel and Expenses	n/a	n/a	$16,000.00
TOTAL INVESTMENT:	**3685**		**$875,300.00**

TRAVEL EXPENSES

All travel related expenses incurred on behalf of the Client by DynTek during the term of this Agreement and delivery of services shall be reimbursed by Client. Receipts for any such travel expenses shall be provided by DynTek during the invoicing process.

SUBSCRIPTION AND LICENSE FEES

Item	Unit Price	Quantity	Extended Price
Bit Titan Migration Wiz	$15.00	900	$13,500.00
ShareGate	$3,995.00	1	$3,995.00
Content Matrix	$35.00	275	$9,626.00

TOTAL COST OF THE PROPOSAL

Item	Estimated Hours	Quantity	Extended Price
Phase A: Analyze and Design	749	n/a	$190,400.00
Phase B: Implementation	3685	n/a	$875,300.00
Software Licenses	n/a	3	$27,121.00
TOTAL INVESTMENT:	4434		$1,092,821.00

APPENDIX A: GENERAL TERMS AND CONDITIONS

Terms of Engagement: These Terms and Conditions of Engagement replace all previous representations or understandings for services to be performed unless superseded by state contract, written purchase order requirements, or a signed Master Services Agreement.

Scope of Work: The DynTek hereby agrees to provide the services set forth in any SOW(s) executed by both DynTek and Client ("Services"); a SOW may be any Quote issued by DynTek and signed by Client without regard to whether it has been signed by DynTek. Client agrees to request Services from DynTek who will provide the Services with the duration, service level and compensation as described in any non-expired, non-terminated or non-cancelled SOW executed by the parties hereto (or by Client if a Quote), from time to time

Terms of Service: DynTek employees or subcontractors, when working on the premises of Client or at their own office, shall observe the working hours, working rules and holiday policy of Client. If Client reasonably requests that an individual DynTek employee or subcontractor cease work under this Agreement, DynTek shall promptly comply with such request with regard to that person. Client will attempt to provide a two-week notice in this regard to DynTek but shall not be required to do so.

DynTek agrees to comply with all reasonable Client requirements related to security, regulatory compliance, health and safety and confidentiality. In accordance with the foregoing, DynTek shall, at its sole expense, as deemed necessary by Client in its sole discretion, perform a background check on each DynTek personnel, service provider or subcontractor (collectively, "DynTek Personnel") who will enter Client's premises or otherwise have access to any Client network. To the extent Client requires that a background check be performed on particular DynTek Personnel, DynTek acknowledges and agrees that such DynTek Personnel shall not enter Client's premises or otherwise have access to any Client network unless Client is satisfied in its sole discretion with the results of such DynTek Personnel's background check. DynTek agrees to put in place such access restrictions as Client may reasonably request in order to prevent DynTek personnel from accessing restricted portions of Client's network. DynTek further acknowledges and agrees that Client shall put in place such restrictions on access to its premises and network access as it deems necessary in its sole discretion in order to safeguard its Confidential Information.

DynTek will at all times continue to be liable to Client for all of its obligations and liabilities in respect of this Engagement, and for all acts or omissions of its subcontractor(s) and anyone employed directly or indirectly by such subcontractor(s).

DynTek agrees that it will and it will cause its subcontractors to discharge its duties under this Agreement in the best interests of the Client and shall do so with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims. DynTek shall, and shall cause its subcontractors to, fully comply with any and all, and take no action that would violate any, applicable laws, regulations, and rules and shall obtain all necessary permits, licenses and consents of any government authorities necessary to comply with or perform this Agreement.

Additional Time: Client shall pay DynTek for the time worked by its employees or subcontractors over eight hours per day or on holidays of Client in the provision of the Services. Such additional time shall be paid by Client to DynTek only when authorized by Client in advance. Payment will be at the regular hourly rate for each individual, as specified in the relevant SOW.

Invoices: DynTek will submit invoices to Client at least once monthly for the Services furnished and any reasonable, pre-approved expense incurred hereunder during the preceding monthly period; Client shall make payment to DynTek within thirty (30) days after receipt of invoice. The invoice shall provide a breakdown and distribution of charges by name of individual and applicable expenses. If Client disputes an invoice amount, Client shall notify DynTek immediately and remit the uncontested amount.

Termination: Client may terminate any SOW without cause and without penalty upon written notice to DynTek. DynTek agrees that upon completion or termination of the SOW, and without regard to whether the Services have been fully completed (and/or installed or integrated) one copy of all notebooks, data, information and other material acquired or compiled by DynTek in respect to the Services, including any source code, object code, and technical documentation, shall be promptly delivered to Client and Client shall pay any undisputed invoices of DynTek for all Services performed prior to termination.

Representations & Warranties: DynTek represents and warrants that it has the right and authority to provide and grant the Services contracted for hereunder and to abide by these terms and conditions. DynTek represents and warrants that it has clear title to, or up to date licenses to, any software it uses, provides or has provided for use in the provision of the Services ("Software"), and that the Software will be free of viruses. DynTek represents and warrants to Client that it will not make unlawful use of any trade secrets or confidential or proprietary information owned by any third party in performing the Services.

DynTek shall use best efforts to immediately replace any DynTek employee or subcontractor determined by Client to not perform in accordance with Client's work site policies or any Statement of Work signed by the parties, and DynTek shall provide a credit of one (1) Project Daily Rate for such non-performance and replacement. In the event DynTek is unable to replace such personnel within five (5) days, Client shall be entitled to immediately cancel the Statement of Work. DynTek warrants that each DynTek employee assigned to provide Services shall have completed a background check acceptable to Client.

Business Ethics: DynTek agrees not to make, or promise or offer to make, payments in the form of money, property, services or otherwise, whether directly or indirectly, to an agency, official, employee or representative of any government or political party, with the intended purpose of influencing the recipient thereof to give favorable treatment or competitive advantage to the Client. This section does not prohibit normal discounts and allowances, entertainment, sales promotion activities and the extension of services and other customary courtesies made in the ordinary course of business.

Force Majeure: Neither party shall be liable for any default or delay in the performance of its obligations hereunder if and to the extent such default or delay is caused, directly or indirectly, by fire, flood, earthquake, elements of nature or acts of God; acts of war, terrorism, riots, civil disorders, rebellions or revolutions in the United States; strikes, lockouts, or labor difficulties; or any other similar cause beyond the reasonable control of such party; and could not have been prevented by reasonable precautions and cannot reasonably be circumvented by the non- performing party through the use of alternate sources, work-around plans or other means.

Insurance: For and during the Term of any Statement of Work, DynTek shall secure and maintain at its own expense insurance to meet industry standards and shall provide Certificate of Insurance to Client upon request.

Governing Law: The laws of the State of New York shall govern the validity, construction, performance, and enforcement of these terms unless superseded by written purchase order requirements or signed Master Services Agreements.

Confidential Information & Data Security: Each party shall maintain the Confidential Information of the other in confidence using the same care and discretion to avoid disclosure of Confidential Information as it uses to protect its own confidential information that it does not want disclosed. Each party further agrees to restrict disclosure of Confidential. Information of Discloser solely to (i) persons who need to know the Confidential Information to perform under the Statement of Work, and (ii) regulators and auditors. Recipient agrees that it shall remain fully responsible for any disclosure of Confidential Information.

As used herein, "Confidential Information" means all non-public, proprietary, confidential information pertaining to or concerning a party or its affiliates including (i) all confidential information relating to the business and affairs of the Client or any affiliate thereof, including, without limitation, all data stored on or processed by the Software and all information relating to (a) its operations, financial affairs, technology, employees, officers, directors or any third party (including any client, investor, partner, portfolio company, customer, vendor, or other person) with which Client is engaged or conducts business, and (b) clients or prospective clients any and all "personal information" of Client, its employees, DynTek's, agents, investors, partners, clients and customers.

The term "personal information" means: (i) any "nonpublic personal information" as such term is defined under the Title V of the U.S. Gramm-Leach-Bliley Act, 15 U.S.C. § 6801 et seq., and the rules and regulations issued thereunder or (ii) any information that can specifically identify an individual, such as name, a social security number, etc., together with any other information that relates to an individual who has been so identified; and (ii) all confidential information relating to the business and affairs of DynTek or any affiliate thereof, including all information relating to its operations, financial affairs, technology, clients and projects undertaken for its clients, and (iii) the logic, structure, sequence and organization of the Software, and all information, data, drawings, specifications, documentation, software listings, source or object code which the DynTek may have imparted and may from time to time impart to the Client, relating to the Software, or any other DynTek product, provided that: (a) information that is independently developed by the receiving party; (b) information which becomes part of the public domain (other than through unauthorized disclosure by the receiving party); or (c) information which, to the knowledge of the receiving party at the time of disclosure, is disclosed by the owner of such information to a third party free of any obligation of confidentiality or of which either party gained knowledge or possession free of any obligation of confidentiality to the disclosing party; or(d) information which was already in the receiving party's possession on a non-confidential basis, before such information was disclosed by the disclosing party.

Each Party recognizes that its disclosure of Confidential Information in respect of the other party may give rise to irreparable injury to the other party and acknowledges that remedies other than injunctive relief may not be adequate. In the event of a breach, or threatened breach, of any of the provisions of outlined in the Governing Law Section, Discloser shall be entitled to seek an interim injunction, interlocutory injunction and permanent injunction in addition to and not in limitation of any other rights, remedies or damages available to Discloser at law or in equity including, but not limited to, specific performance and other such relief as a court of competent jurisdiction may deem just and proper, as well as such monetary damages as may be proven at law. Recipient further agrees to waive any requirement for the deposit of security or posting of any bond in connection with such remedy. Each of the parties hereto agree to waive the right for trial by jury of any or all issues arising in any action or proceeding between the parties hereto or their successors, with respect to the provisions outlined in the Governing Law Section.

To the extent DynTek stores or otherwise controls any of Client's Confidential Information on DynTek's network or systems, DynTek shall maintain administrative, physical, and technical safeguards for protection of the security, confidentiality DynTek integrity of such Confidential Information. DynTek shall not (a) modify Confidential Information, (b) disclose Confidential Information except as compelled by law or as expressly permitted in writing by Client, or (c) access Confidential Information except as may be necessary to fulfill its obligations under this Agreement.

Indemnification: DynTek shall indemnify and hold harmless the Client, and its affiliates or representatives (collectively, the "Indemnified Parties") from and against any and all claims, actions, liabilities, obligations, fines, damages, losses, demands, recoveries, deficiencies, costs or expenses, including without limitation, reasonable attorneys' fees and expenses, which the Indemnified Parties may suffer or incur in connection with (a) DynTek's or its subcontractors' fraud, gross negligence, or willful misconduct, or (b) a claim by a third party that the services provided pursuant to this Agreement infringe upon such third party's intellectual property rights.

Independent Contractor Status: No relationship of principal and agent will exist between Client and DynTek. The parties will remain at all times independent contractors. In no event will either party's staff or subcontractors be considered agents or employees of the other party's.

APPENDIX B: ACCEPTANCE

Signatures below acknowledge execution of this agreement:

DYNTEK	
County of Santa Barbara	DynTek Services, Inc.
Customer Name / Title	Jason Gordon Sr. Account Manager
Authorized Signature	Authorized Signature
Date	Date