

RFP IT-19-106
Data Migration Tools and Services
Questions and Answers

No.	Question	Answer
USAC ATT2 Requirements Spreadsheet DMS Tools Questions		
1	Section: 3.8 Can USAC provide a few specific examples of the security and permissions policy issues required to be identified?	<ul style="list-style-type: none"> • Identify documents with sensitive content to assure the correct permission policy is applied. • Ensure that all the documents that are migrating have the correct permissions/roles and security automatically assigned. • Ensure that all the documents that are migrating have the metadata automatically assigned. • Ensure that all documents have confidentiality markings consistent with published USAC policies.
2	Section: 3.15 The RFP page 2 Figure 1 shows Box is being used for the foreseeable future. What is the goal of scanning the content in Box if the content is not being migrated to Office 365? What is the goal of scanning content in Service Now? What content in Service Now do you want scanned and what is the concern and outcome USAC desires to achieve?	<ul style="list-style-type: none"> • Figure 1 is intended for background, it displays the current state and capability rollout. • For the purposes of this RFP the scope of migration is to support the RHC pilot. The RHC pilot will only consist of migrating data from the X drive. • USAC anticipates this pilot to run for 75-90 calendar days.
3	Section: 7.3 How many workflows does USAC currently have in each system (Documentum, SharePoint, etc.) that need to be migrated? How many have more than 10 steps? How many steps to the workflows over 10 steps have and what system are they associated with (Documentum, SharePoint, etc.)?	<ul style="list-style-type: none"> • There are no workflows to be migrated. After award, USAC will provide sample workflows for purposes of recommendation in metadata strategy. • This is requirement is for a governance / monitoring tool. • For this RFP the main goal is to move the content from X drive to O365 with correct permissions, security and metadata. • The data migration from Documentum is not part of this RFP but we would like to see if the tool is capable of that. If there is any connector of your tool with Documentum to be able to prototype the data migration preserving security access and defined metadata.
4	Section: 7.6 Is the use case of concern here that someone manually classifies a document incorrectly or something else and if so what else?	<ul style="list-style-type: none"> • Yes, an example might be a document that gets the wrong label or an Invoice that is manually placed in the wrong location. We would like to be able to identify these issues so we can correct them. • We would like the system to tag the documents automatically, set metadata from the source folder and custom metadata. This will help the user later to do a keyword search. The folders are arranged by departments and we would like the tool to get all the information it can gather and set the roles/permission while migrating the documents.
5	Section: 7.7/7.8 Can you provide a few use-case examples of compliance violations for operational and security policies you would like the system to detect along with what you would expect the solution to auto-discover in order to flag the document as violating a policy?	<ul style="list-style-type: none"> • Identify security configurations that are not configured per USAC policies. • Identify suspicious user activity that could point to a security policy violation. • We would like the ability to scan and identify these issues so we can take the necessary corrective action. • We need to securely safeguard USAC content with respect to USAC security / privacy policies. For example: <ul style="list-style-type: none"> <input type="checkbox"/> We need the system to detect personally identifiable information (PII) sensitivity information from the content (e.g. : detect SSN from XXX-XX-XXXX or the pattern of account number/ routing number) <input type="checkbox"/> The system should not allow the user to save the PII in any other location other than those that are designated for PII. <input type="checkbox"/> When the user save/copy/create the document the system should give a warning message that it contains PII. If it contains sensitive PII, the system should not allow the user to save the document in a non PII location <input type="checkbox"/> When a user shares a document with a user outside of USAC, the system should check for PII and give the user a warning message that they are going to share the PII information.
6	Section: 8.14 Can you provide more clarity on your physical records use case? Do you want to scan in these documents by the end of this year to follow Federal policy for electronic records? Are these paper files you want to keep hard copies on and track the name of the file and their disposition schedule or something else	We do not have a specific use case for this yet, but would like the capability to track physical records with the tool post scanning.
7	Section: 8.15 Can you provide an example of a multi-stage retention situation that most commonly confronts USAC?	<ul style="list-style-type: none"> • We do not currently have retention policies configured but we may have the need to configure multiple stages such as a review stage before final disposition. If this cannot be accommodated in out of the box SharePoint, we would like recommendations on tools that can do this. • We would like to see the capabilities of the tool for retention policies. Currently it is not configured, but we need to know the tool have the capability to accommodate in the future and any recommendation for us.
USAC ATT2 Requirements Spreadsheet DMS Services Questions		
8	Section: 6.0 When training USAC staff on the tools, will this training be limited to USAC permanent employees or is the expectation to train other USAC contractors.	The training will include both permanent employees and contractors. There will be about 8-12 people in total.
Additional RFP Questions		
9	Page 4: III Current State Figure 1 – what are you using the SharePoint 2007 Extranet site for? Is there an Extranet requirement moving forward we need to understand?	Extranet is used for collaborating and transferring document content to FCC. The Extranet data is included in the 189GB estimate.

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10	Page 4: III Current State Figure 1 – Do we need to be concerned with anything related to content in Confluence, Trello, Product Plan or Kiteworks?	No, currently there are no plans to migrate these to the O365 environment.
11	Page 5 Figure 2 shows Enterprise-Wide User Training. Is this something USAC expects this contract to support or are we only training the USAC IT staff who will train the rest of the enterprise?	<ul style="list-style-type: none"> • Enterprise wide training is out of scope for this RFP. • USAC expects the contractor to only train key IT and Change Agent staff during the tool install, use in migration of pilot data, and consult n metadata strategy, governance, and change management planning. • See Question #8.
12	Page 5 – when is the target rollout date for the O365 pilot launch of the RHC SharePoint Online site?	<ul style="list-style-type: none"> • We are in pre-pilot preparation now, expect the pilot to have 3 main stages: <ul style="list-style-type: none"> o Readiness review late October 2019 o Technical assessment and validations through November 2019 o User assessment and validation pilot late-November through mid-January 2020 • We anticipate the contractor for this effort will work at USAC through the pilot completion. This will include pilot close out, and updating organizational process assets (lessons learned, knowledge areas, training, etc...).
13	Page 6 – will USAC provide computers and software or just network access? If we bring our own computers are there any security requirements for our computers (Norton AV, Windows Defender ATP, etc.)?	USAC will provide computers, software, and access.
14	Page 26 Section D Attachment 3: Resumes/Biographies for Selected Key and Non-Key Personnel is mentioned but it is not part of the proposal package – where can we find this?	<ul style="list-style-type: none"> • Contractor is to create Attachment 3 using a format they choose. • Key personnel is project manager. • Non-key personnel are skilled in tool(s) usage, and consulting services outlined in RFP section IV and attachment 2.
15	Please provide the current application landscape that is required to be accessed?	<ul style="list-style-type: none"> • See figure 1 column 2, light blue items are to be used in the pilot • Additional information can be supplied at kickoff
16	What is the total size of content?	The total that will be migrated in regards to the scope of this RFP is 189-191 GB.
17	What is the current user base - internal and external?	Internal users (~600) plus external document collaboration partners (~500).
18	What is the current state of SharePoint Online?	<ul style="list-style-type: none"> • SPO has been configured in the E3 Microsoft environment. • Initial setup of RHC department site plus landing page is complete. • We are migrating the SPO to the Microsoft GCC environment by mid-October. • Access, roles, and permissions are being implemented through a provisioning plan.
19	Was there any previous exercise done for assessing data migration? If so, what was the outcome?	<ul style="list-style-type: none"> • No. • Analysis, pre-migration tasks, etc. are required in this effort.
20	Is the retention policy and other workflow documents well documented?	<ul style="list-style-type: none"> • Yes, USAC has a Records Retention policy with retention schedule. • We have documented the use cases for workflow.
21	How much content is currently in SharePoint OnPremise (2007, 2010)?	The amount of content for the SharePoint OnPremise is out of scope for this procurement. USAC will provide detailed information regarding content after award, to assist in metadata strategy development.
22	How much content is currently in shared drives?	<ul style="list-style-type: none"> • For this RFP the contractor will be migrating 189GB of data, roughly 125,000 files of Rural Healthcare Program data. • There may be 1-2GB of additional corporate data that is being considered.
23	Do you have sub-departments, smaller functional areas where focus should be given?	<ul style="list-style-type: none"> • Yes, this RFP requires migration services for migration of USAC's RHC SharePoint and shared folder content as part of our initial O365 pilot prior to launch. • The Pilot is being user tested by 2 of the 3 main sub RHC elements. • We expect that the migration strategy and tools delivered as part of this RFP will include the subsequent migration phases to be executed in-house by USAC over time.
24	Is the requirement for only assessing and providing strategy migration of documents? Does this also include exchange migration and other tools as shown in the table?	<ul style="list-style-type: none"> • The current requirement is the Migration of X drive documents (125,880 files) to O 365 and give training to the technical team in USAC for installation of the tool, configuration of the tool, and migration of the data. In addition, the Contractor shall provide guidance on the capabilities of tools that USAC can use in the future and all the documentation of the installation, configuration migration, etc.
25	Does USAC know how much data they are anticipating to migrate? i.e. 1TB, 5TB? RFP reference 125K documents, but would like to know the size.	<ul style="list-style-type: none"> • This contract only supports the pilot migration. • For the pilot: 125,880 files / 189 GB. • USAC is assessing the possibility of an additional portion of 2GB of Corporate to be migrated during the pilot.
26	Can you please list out all of the data source (on prem) systems that we will be migrating data from? I.e. share drive, SharePoint, etc.? There are mentioned of several sources, but we would like a compiled list.	<ul style="list-style-type: none"> • Migration for the pilot will be from X drive only. • X drive data was moved from various sources and manually cleaned, such as duplicate file removal.

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27	<p>Page 6, Section VI Performance requirements. This section references a Project Plan submitted at time of proposal "During the project kick-off meeting, the Contractor shall present its Project Plan, as provided in Contractor's proposal response."</p>	<ul style="list-style-type: none">• Page 6 is continuation of Section IV Goals, Section VI beginning on page 8 is SCOPE OF SERVICES AND DELIVERABLES.• Offerors are not required to submit a project plan as part of the proposal. The Project Plan, its scope, and due date will be agreed upon at the kick-off meeting.• USAC anticipates this timeframe to be less than a 10 work day span to publish the Project plan.• Offerors are encouraged to submit a notional plan based on similar project work and experience.• As set forth in Section B.V of the RFP, USAC is not a federal agency or Contractor to the federal government. USAC is a not-for-profit Delaware corporation.
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