

RFP Questions and Answers

No.	Question	Answer
1	Does USAC have any existing O365 plan? E.g. E1/E2/E3.	Not yet.
2	Which teams and roles have been identified from USAC and what is their availability for Task 1?	<p>Initial project roles may include:</p> <ul style="list-style-type: none"> - Product manager - UI/UX team - Security Engineer & Privacy Lead - Service Desk Team - Identity Access Manager - SharePoint & infrastructure architects and developers - IT Operations engineers (storage, servers, network) - Project manager - Business owners and stakeholders - Pilot (prototype) Team <p>Availability during this engagement is assumed for all required SME interactions, business requirements and knowledge transfer.</p>
3	<ul style="list-style-type: none"> - Please share more details around the current backup (hardware and software) process for both file structure and work drive as well as disaster recovery system. - How are these set up in current infrastructure? 	<p>USAC's current Microsoft on premise components (hardware and software) are backed up to USAC's data center.</p> <p>For SharePoint backups, we currently have a combination of server (VM) level backups as well agent level backups. The backups are stored on premise on our private cloud and replicated to our DR private cloud. Our backup policy is to have daily backups for thirty days and monthly backups for one year.</p> <p>All our network shares are on a NAS. It takes snapshots twice a day and kept for fourteen days. For DR, all production data are replicated real-time to our DR private cloud.</p>
4	Can you please share the business requirements around the SharePoint Online site to be used for user pilot testing?	The goals for the SharePoint Online department prototype site include support for a full, representative set of SharePoint online features for both publishing and collaboration (team) sites. Design and requirements are still being developed but attached is a general set of functional requirements for USAC's O365 migration project.
5	<ul style="list-style-type: none"> - Please share the volume of users to be considered for support. - What type of support is required? Technical, End User or both? - What are expected support hours and days? Weekdays, Weekends, off hours, etc.? 	<p>At full implementation the total number of end-users will be 1,127 (604 internal and 523 external), however technical support will only be escalated to the vendor from USAC's Service Desk and/or O365 Team. The contractor WILL NOT be fielding calls directly from end-users.</p> <p>Technical support required M-F 8pm to 6pm.</p>

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6	Is there any system level integration with 3 rd party business process outsourcing partners, if yes, please provide details?	Not at this time.
7	<ul style="list-style-type: none"> - Kindly elaborate on the scope pertaining to migration of existing intranet/extranet to O365. - Kindly also elaborate on any required data migration activities with content mapping details. 	<ul style="list-style-type: none"> - Our entire corporate Intranet will be migrated from SharePoint on premise to SharePoint Online. However the vendor is only asked to provide one department site prototype and USAC will configure and migrate the remainder of the department and other corporate sites. - USAC's extranet is on SharePoint 2007 and performs mostly file exchange with a small number of external partners. Current plans have this migrating to SharePoint online. This is low priority and depends on whether these external file sharing needs can be met by other secure file exchange solutions already in place.
8	<p>Please help us with following information regarding extranet SharePoint 2007 section:</p> <ul style="list-style-type: none"> - Number of web applications - Number of site collections - Number of subsites - Number of custom content sites - Number of custom solutions and site columns 	<p>Number of web applications: 0 Number of site collections: 9 Number of subsites: 18 Number of custom content sites: 0 Number of custom solutions and site columns: 0</p>

Continuation to answer question #4

BR #	USAC Business Requirement
1.1	Enable collaborative content authoring and file sharing across the enterprise
1.1.1	Local authoring/editing - Content editing is performed locally using desktop-based tools
1.1.2	Real-time collaboration (simultaneous edit access) - Ability to allow multiple viewers and/or multiple authors (co-authoring) to view/make changes to a document simultaneously). Users will see co-authors presence and see changes made in real-
1.1.3	Exclusive edit access - Ability to "check out" and "check in" both electronic document and physical records to support
1.1.4	Versioning - Ability to store/retrieve previous versions and automatically increase the version number of the document
1.1.5	Content metadata - Support for adding metadata to stored content
1.1.6	Custom collaboration groups - internal - Support for configuration of internal collaboration groups - e.g. Department,
1.1.7	Custom collaboration groups - external - Support for configuratino of groups that include external participants - e.g. FCC,
1.1.8	Change notifications - Users can subscribe to be notified of edits / changes / version updates to files or changes to folders
1.1.9	Change logging - Ability to set up a detailed permanent audit log of all actions performed on a document including user and
1.1.10	Virtual folders - Allows users to combine and aggregate files into their own personal "virtual" folders. For example, a Project Manager might have a folder for project documentation, project legal contract documents, invoices, design documentation and emails from their customer all in one "virtual" folder, even though each individual piece of information is stored in
1.1.11	Data classification - Select a document type and have pre-defined rules followed (need clarification)
1.2	Support a variety of content storage and archiving options in an integrated solution
	Local storage - Personal/local storage available and accessible for local users
	Shared storage - Storage accessible to multiple users
	Content back-up and recovery - Storage able to be configured for automated back-up (with bulk recovery options) and documents accidentally deleted by users (with delete permissions) can be quickly recovered by administrators.
	Multiple artifact formats - Can store virtually any kind of document in its native file format.
	Easy-to-use file structure - Users can easily configure libraries and folders for customized file structures.
	Document-to-document linking - Has document to document linking to allow users to bundle files into logical groups and integrated viewing capability to display all linked files screen.
	Large document storage - Allows storage and retrieval of very large document sizes
	Automated file migration
	Persistence of local content for inactive user accounts - Support for retaining user content for accounts that require
1.3	Support for document retention policies with automation
	Support for retention policies - Retention polices for converting to a record, archiving and deletion can be set on a document type and done automatically based on a determined date.
1.4	Allow customization of content publishing and other content services workflows
	Support for custom workflows - Ability to create and apply custom workflows for approvals and other content publishing
	Draft and publishing support - Users can easily create staging and collaboration areas for documents as they are being worked on. Once reviewed and approved, documents can be moved or linked to publishing folders for wider spread
	Review and approval workflows - Supports easily configurable document review and approval workflows for documents needing to pass through several authors, reviewers and approvers before being ready for general distribution. The review
	Multiple approvers and sign-off - Allows documents to be sent to one or many users for sign off. Approvers are able to approve (or reject) the document providing comments and feedback where required. A sign-off top sheet for each document version is maintained so users can see who approved or rejected the document and the feedback they provided.
	Delegate reviewers and approvers - Provides the ability to delegate review and/or approve tasks and signing authority to other users for individual tasks or for all tasks over a given time period.
	Task lists - Users participating in review or approval workflows are provided with a personalized task list for all tasks assigned to them. Users can see at a glance their tasks, a description of the work to be done, who assigned the task and
	Event reminders and integration with Microsoft Outlook - Workflow features integrate through Microsoft Outlook email and automatic event notification via email. Workflow tasks can be viewed in a calendar.
	Audit trail - Workflows create an audit trail.

	Automated workflow start - The workflow can automatically start when a document is added and can be restarted when
	Access restriction based on workflow participants - A document under a workflow process can be checked out only by a participant in the active workflow activity.
	Adhoc and rule-based workflows - Workflow must provide support for adhoc and rules based work flows.
	Support for external users - Workflows that can incorporate external (non-USAC) stakeholders outside of USAC premises
1.5	Support Advanced content search and document discovery
	Metadata support - Ability to classify documents with metadata. The number of metatags and document types should be unlimited.
1.5.1	
1.5.2	PDF metadata extraction - Supports PDF Forms Metadata Extraction.
1.5.3	Automatic tagging - Ability to automatically tag documents (add metadata) simply by dragging the documents into a folder.
1.5.4	Search metadata and/or content - Can search the metadata associated with the document as well as the actual content of
1.5.5	Content search for multiple file types - Ability to extract and search the content from file types including PDF, Microsoft
1.5.6	Search results export - Can export search results and import them into an analysis tool, such as Excel.
1.5.7	Restricted search results - Users can only search for and find (retrieve) find documents they are authorized to access.
1.5.8	Field-based index searches - For textual and numeric fields, allows searches based on exact or partial matches of specified
1.5.9	Full text indexing - Accommodates "Full Text Indexing" (i.e., OCR) to search for and retrieve files.
1.5.10	Multiple index word search - Ability to retrieve documents using multiple index words, numbers, dates, etc., simultaneously. Allows Boolean operators (True, False) to assist searches.
1.5.11	Relevance search - Support for search results to be ordered by relevance (e.g. most recent version on top)
1.5.12	Hardcopy search - Ability to track location of hardcopy paper documents and physical records and locate via search.
1.5.13	Automated discovery - (need description)
2.1	Robust security features and configurable permissions to support data security for sensitive information
2.1.1	Access/permissions administration - Ability to easily and flexibly configure external access/permissions for external users
2.1.2	
2.2	Secure file collaboration and transfer between USAC staff and external stakeholders
2.2.1	File transfer with partners (normal & secure) - Allows off-premise (external) users to access documents per pre-defined
2.2.2	Administration/user management - Flexible administration of external partner user accounts (onboard, offboard, recovery)
3.1	Records management support including auditing, metadata, litigation holds
3.1.1	Record auditing
3.1.2	Record metadata
3.1.3	Record holds for litigation

4.1	Workflows that allow for scanning, reviewing, sorting and approving of documents within a defined user group
4.1.1	Enter information
4.1.2	review
4.1.3	Approval/close out