

**SEMINOLE COUNTY GOVERNMENT
AGENDA MEMORANDUM**

SUBJECT: Migration to Microsoft Exchange/Outlook

DEPARTMENT: Information Technologies **DIVISION:** Information Services

AUTHORIZED BY: Chris Grasso, Director **CONTACT:** Kim Patterson, Manager **EXT.** 1100

Agenda Date <u>7/26/2005</u> Regular <input type="checkbox"/> Consent <input type="checkbox"/> Work Session <input type="checkbox"/> Briefing <input checked="" type="checkbox"/>
Public Hearing – 1:30 <input type="checkbox"/> Public Hearing – 7:00 <input type="checkbox"/>

MOTION/RECOMMENDATION:

Staff is seeking direction from the Board of County Commissioners on the migration from Domino Lotus Notes to Microsoft Exchange Outlook. Staff has presented Board members with an issue paper and consultant's report outlining the necessary steps and costs associated with moving forward with this project.

BACKGROUND:

After several discussions and meetings, the County Manager asked staff to prepare a migration plan from Domino Lotus Notes to Microsoft Exchange Outlook identifying the potential cost and impact. Upon commencement of an internal assessment, it became obvious that an outside expert was necessary to design a plan and produce a comprehensive report. The necessary expertise of the Exchange Outlook setup and possible issues with the migration did not exist internally.

Compuquip Technologies of Miami, Florida was recruited based on their experience with both Domino Lotus Notes and Microsoft Exchange Outlook which included migrations with both systems. The experience that the vendor brought to the assessment ensured that a comprehensive, unbiased, thorough report was available for the County Manager and Board of County Commissioners.

Staff briefed each Commissioner and presented to them an issue paper (copy attached) and a copy of the consultant's report outlining the necessary steps to proceed with the implementation of this project.

Staff prepared the following options for the Board's consideration:

Option #1: Take No Action: Microsoft and Domino Lotus Notes have announced major changes and enhancements to their software due for release in the Spring of 2006. In light of the possibility for significant changes and enhanced software integration by both software providers, the Board may decide to postpone its decision on

Reviewed by:
Co Atty: _____
DFS: _____
Other: _____
DCM: <u>[Signature]</u>
CM: <u>[Signature]</u>
File No. <u>BITOL</u>

how best to implement the migration to Outlook. This would allow time for staff to evaluate both of these software packages for effectiveness and their ease of use. However, there is no guarantee that the release will occur in the Spring or that new version will be a superior product; postponement may just be an unnecessary delay.

Option # 2 - Slow Migration: Per the consultant's recommendation, migration of users from Lotus Notes to Outlook will occur in small groups. This option may be desirable because it spreads the cost of migration over several years, allows for more in-house training, and allows for the analysis described in Option #1 to occur before significant spending occurs.

Initially, a small group of users will participate in a client beta test. This group should be comprised of non-technical staff, such as the County Manager's Office/Commissioners' Offices. The group will evaluate the effectiveness and ease of use of the client application. The client application is basically the e-mail and calendar functions and runs on the existing Domino Lotus Notes Server; therefore, current budgets would absorb the associated costs. Upon completion of the test, its findings would be presented to the Board for authorization to continue migration.

Upon authorization to continue, a consultant would prepare a detailed implementation plan that will cost approximately \$40,000 in FY 05/06. Once the implementation plan is developed, the County would then move forward with hardware, software, licensing, training, and additional consulting services. The estimated cost to the FY 06/07 is \$659,183. The balance of the implementation and migration costs of \$761,183 would be needed in FY 07/08. The proposed two-year budget accommodates this scenario.

Option #3 - Immediate Migration: This option proposes that the migration be fully implemented immediately. This option may be desirable because it causes everyone in the County to be working on the same system at the same time. This would require the consultant's costs of approximately \$40,000 in the FY05/06 budget dollars plus the \$1,420,366 over the following two years.

Staff Recommendation:

Staff recommends that the Commission authorize staff to proceed with Option #2.

Domino / Lotus Notes migration to Microsoft / Exchange Outlook

Issue Paper Prepared by Information Technologies

April / 2005

This White Paper has been prepared to provide a perspective on the County's current use of Domino/Lotus Notes and what impacts would be experienced by the users and systems if we were to migrate to Microsoft Exchange/Outlook.

As a point of clarification, this project is much more than an e-mail migration. This migration would be based on migrating from a multi-purpose applications development and operation database platform that also provides e-mail, calendaring and similar business time management applications through Domino Server/Lotus Notes, to Microsoft Exchange/Outlook which also provides e-mail, calendaring and similar business time management applications. However, Exchange/Outlook does not have the tools for development of interactive applications and services provided through a single enterprise-wide solution. A simple migration of two email systems would be fairly simple from a technology standpoint, however, when you include the enterprise wide application development capabilities associated with the system architecture of Domino/Lotus Notes, the issue of migration becomes much more complex.

History

The County's decision to utilize the Domino/Lotus Notes approach was evaluated and made back in 1995 after many months of research and comparison of available systems. Given the situation at the time, the focus was to identify an e-mail system. However, there were many other needs that had to be considered including a limited budget that needed to be stretched to provide County-wide communications and an application solution. After research and cost analysis, the decision was made that the Domino/Lotus Notes was the best solution for the County. Although it was slightly more expensive to install initially than some of the other "e-mail only" systems available at that time, the long-term benefit of maximum efficiency and customer satisfaction would outweigh that initial cost.

This decision has been reviewed on several occasions, including a 1998 study by the County Steering Committee, which included representation from each department and the County Manager's Office. As many of the technologies were being evaluated for replacement, Domino/Lotus Notes was evaluated again during the Y2K review utilizing the County Steering Committee comprised of County-wide representatives and our outsourcing vendor (H.T.E. of Lake Mary). Most recently, the County's use of Domino/Lotus Notes was reviewed in 2002 during the I.T. Department's Strategic Planning and benchmarking process. It was during this reviews that many of our internal department process and decisions were challenged, reassessed, and a realignment of our structure occurred.

Direction

After several discussions and meetings that included the Board of County Commissioners, the County Manager asked Information Technologies to prepare a migration plan from Domino/ Lotus Notes to Exchange/Outlook identifying the potential cost and impact. Upon commencement of an internal assessment, it became obvious that an outside expert was necessary to design a plan and produce a comprehensive report. The necessary expertise of the Exchange/Outlook setup and possible issues with the migration did not exist internally. A vendor was recruited based on their experience with both Domino/Lotus Notes and Exchange/Outlook, including migrations. The experience that the vendor brought ensured that a comprehensive, unbiased, thorough report was available for the County Manager and Board of County Commissioners.

The requested scope stated that Seminole County has a very high priority project that we are seeking third party assistance on, to compile a complete unbiased report to assess a current challenge in the County. Seminole County currently is using Lotus Notes/Domino as an e-mail/calendar/database solution.

We asked the consultant to provide us with a complete analysis and evaluation of migrating to Microsoft/Exchange/Outlook. The analysis should compare Lotus Notes/Domino to Outlook/Exchange and include the following: Security, pros and cons of each system, cost comparison, staffing requirements, hardware requirements, disaster recovery and redundancy, industry standards, and a list of major users of both systems.

Compuquip Technologies of Miami, Florida was selected as the most qualified vendor for this project. Compuquip is a highly qualified industry-recognized organization that has been in business for over 20 years in the technology consulting arena, as well as the integration of business systems and integrated services. Compuquip has extensive experience with both Lotus Notes to Outlook and Outlook to Lotus Notes migration projects, as well as several projects supporting co-existence.

At the initial meeting, the scope of the project was further defined and explained. Compuquip understood that the final product needed to be a migration plan and not an operational or industry comparison of Domino Lotus Notes and Exchange Outlook. The goal was to identify the preliminary steps for the migration, the impacts on our systems, hardware and software requirements, a functionality comparison and an outline of additional services that would be necessary to move forward on this project.

Upon completion of the report, the final product was provided to County Manager Kevin Grace, and Deputy County Manager Don Fisher. A meeting was scheduled with Kevin Grace, Don Fisher, Commissioner Bob Dallari, and the Information Technologies Department Director Chris Grasso. The migration issue was discussed at length and the findings of the reports were shared with Commissioner Dallari. The report identified an approximate first year cost of migration of \$1 million. This cost included a large up front investment in hardware, consulting and programming that was required to replace the Domino applications, based on the cost, history and outcome of the report, a list of the applications, customers affected, and additional details regarding what would be necessary to replace these applications.

Prior to reporting the results of the additional research back to the County Manager, the migration issue was discussed with Dr. Ron Eaglin from the University of Central Florida,

who is the project lead for the SciNet project involving Planning and Development. The goal was to insure that there would be no issues associated with migrating or not migrating to another e-mail platform that would inadvertently affect the SciNet project. Dr. Eaglin also has extensive experience and expertise, and it was valuable to gather another perspective and opinion of the migration. A copy of the report and additional supporting documentation was provided to Dr. Eaglin. In meeting with Dr. Eaglin on two separate occasions, he agreed any decision to migrate or stay with Lotus Notes would have no adverse effect on the SciNet project. He questioned why the County was considering the migration at all since Lotus Notes was working very well for the County. He also commented on the enterprise-wide effect of the system and the number of applications that would have to be replaced or rewritten. In a totally separate meeting at the University during a SciNet weekly project meeting, he once again commented that the report had been well researched and well written. Even if the County decided that this was still the desired direction, it would be impossible for the IT department to support a migration from Domino/Lotus Notes to Exchange/Outlook while working on the SciNet project.

The Information Technologies Department is very cognizant of the wishes of some of our customers to migrate to Microsoft Outlook and as a service provider we want to be responsive. At the same time, we must take into consideration the direction of technology, future open operating systems and new releases and deployment of software systems being developed by both Domino and Microsoft. From a resources perspective, it is imperative that the County establish one solution. Current budget and staffing cannot support multiple systems.

The one thing that we know is certain is that change will occur. We have tried to position ourselves through partnering with our user departments to be in sync with what is currently available, while being cognizant of the new technologies that will be coming. The crystal ball for technology that used to have a fairly stable view for 3 to 5 years has been reduced to 12 to 18 months. We consider it our responsibility to try and position the County in a positive proactive position to take advantage of all options and new technologies as they are presented. As technology changes it is our responsibility to be the technology change agent. We must responsively make any changes while remaining cost efficient and a facilitator of insurance, as well as assure consistent services are delivered to the community as a County.

Information Technologies remains committed to supporting all of the users of the Board of County Commissioners, the Constitutional Officers and municipalities, as well as the other Governments we have as users and business partners. We are committed to the County Manager's Strategic Planning process, goals and objectives and we look forward to bringing forth and deploying whatever solution we choose as a government for our future operations.

Compuquip TECHNOLOGIES

8399 NW 30th Terrace Miami, FL 33122

SERVICE AGREEMENT

(305) 436-7272 - Office

(305) 436-9149 - Fax

Monday, May 23, 2005

Customer Billing Information
Seminole County Government Kim Patterson KPatterson@seminolecountyfl.gov IT Manager, Information Technologies 1101 E 1st St Sanford, FL 32771 Office 407-665-1100 / Fax 407-665-1110

Sales Representative : Eric Dosal - ext. 1142
Inside Partner : Arely Burns - ext. 1238
Quote Number : 052405SCGKP

Customer Shipping Information
Seminole County Government Kim Patterson KPatterson@seminolecountyfl.gov IT Manager, Information Technologies 1101 E 1st St Sanford, FL 32771 Office 407-665-1100 / Fax 407-665-1110

Phone Number : (305) 436-7272
Fax Number : (305) 436-9149
Quote Valid Until : Wednesday, June 22, 2005

QTY	MANUFACTURER	DESCRIPTION	UNIT PRICE	TOTAL
1	SERVICE	Professional Engineering Services - Migration Discovery	\$ 44,150.00	\$ 44,150.00
		<i>Tasks</i>		
		- Review current Lotus Notes environment. - Review current network environment - Document all requirements for Exchange environment. - Assess domino application environment		
		<i>Deliverables</i>		
		- Lotus architectural review document - Network topology document - Recommended Exchange server requirements and settings - General migration plan with time estimates - Domino database migration time estimates		
			Existing Customer Discount (10%)	\$ (4,415.00)
			Sub-total	\$ 39,735.00
			Freight	NO CHARGE
			Tax	NO CHARGE
			TOTAL	\$ 39,735.00

Compuquip Technologies ("Seller") agrees to sell, and Purchaser agrees to purchase, pursuant to the terms and conditions of this Sales Agreement and any addenda attached hereto, the following equipment listed above which shall be referred to in this Sales Agreement as the "Equipment". This agreement, consisting of the foregoing, correctly sets forth the entire agreement between Seller and Purchaser with respect to the purchase and sale of the above described equipment. No agreements or understandings concerning the foregoing shall be binding on either of the parties hereto unless specifically set forth in this described equipment. No agreements or understandings concerning the foregoing shall be binding on either of the parties hereto unless specifically set forth in this agreement. By executing this agreement below, the signer hereby certifies that he/she has read this agreement and the Purchaser agrees to its terms and conditions and that the signer is duly authorized to execute on behalf of the Purchaser named above.

CUSTOMER SIGNATURE _____
NAME _____ **DATE** _____
TITLE _____
 Please Circle
Requested Shipping : (Ground) (2nd Day) (Overnight) (Next Day AM)

ACCEPTED BY _____
NAME Thomas Ewing
TITLE VP and General Mgr.
DATE _____

**PROFESSIONAL SERVICES AGREEMENT
TERMS AND CONDITIONS**

1. TERM: Unless otherwise set forth on the opposite side hereto, this Agreement is effective upon acceptance by an executive officer of Seller, and shall continue until the Services are performed or this Agreement is otherwise terminated pursuant to the terms hereof. Either Seller or Customer may terminate this Agreement without cause upon sixty (60) days prior written notice to the other, in which case Seller shall, in its sole discretion, determine its costs through the effective date of termination, and its percentage of completion of the Services, and determine what, if any, refund amount is due to Customer. Notwithstanding the foregoing, in the event this Agreement is terminated for any reason whatsoever, under no circumstances shall any deposits paid by Customer pursuant hereto be returned to Customer. Upon the termination of this Agreement and/or upon completion of the performance of the obligations set forth herein, the parties shall have no further obligations hereunder. The rights and obligations of the parties hereto shall survive termination of this Agreement to the extent necessary to preserve the intent of the parties.

2. TIME OF PERFORMANCE: Unless otherwise stated in this Agreement, the Services will be provided from time to time during the term hereof between the hours of Eight (8) A.M. and Five (5) P.M. Monday through Friday, excluding holidays. Any Services performed outside this time period will be billed at Seller's rate in effect at that time for services comparable to the Services performed.

3. RESPONSIBILITY:

a.) **Access:** Customer shall provide access to the Customer's facilities where its computer systems are maintained and adequate and suitable facilities and space for Seller's personnel to work at the Location and on such computer systems. If Seller determines that the Services require Seller to remotely access Customer's computer systems, Customer agrees that it shall also provide Seller with all information requested by Seller in order to remotely access Customer's computer systems.

b.) **Representations and Warranties:** In conjunction with the performance of the Services, Customer represents and warrants that (i) Customer has full right, power, and authority to consent to have the Services listed on the first page performed; and (ii) the execution, delivery and performance of this Agreement does not or will not violate or cause a breach default under: (A) the governing corporate or company documents of Customer; (B) any agreement, lease, mortgage, license or other contract to which Customer is a party; or (C) any law, rule, regulation, order, decree or consent action by which Customer is bound or to which it is subject. Customer shall defend Seller if the performance of the Services under this Agreement infringes any patent or copyright registered in the United States, trademark, trade secret or other intellectual property right. Subject to the conditions and limitations of liability stated in this Agreement, Customer shall indemnify and hold harmless Seller against any such claims and shall pay any costs or damages and expenses (including attorney's fees) finally awarded against Seller by a court of law, agreed to in settlement or awarded by any other body or person authorized under law or contract to award such damages.

Customer also acknowledges and agrees that the providing of the Services may in some circumstances result in the disruption of services at such site(s) or loss or damage to software or hardware. Consequently, Customer agrees that it is Customer's responsibility to perform backups of data on all devices connected to Customer's IP addresses and/or domain names prior to Seller providing the Services. Customer further assumes the risk for all damages, losses, and expenses resulting from the Services. Upon Customer's prior written request, Seller will (at an additional cost to Customer), attempt to save any data and programs on Customer's computer systems that will be utilized by Seller in the performance of the Services.

c.) **Limitations on Liability:** The services are being provided "as is" without any warranty of any kind. Without limiting the foregoing, Seller makes no warranty whatsoever that the Services will be error-free, free from interruption or failure, or secure from unauthorized access, or that it will detect every vulnerability to Customer's network, or that the results generated by the Services, will be error-free, accurate, or complete. The Services may become unavailable due to any number of factors including scheduled or unscheduled maintenance, technical failure of the software, telecommunications infrastructure, or the Internet. This limitation shall apply regardless of whether (i) Seller determines that Customer's systems are deemed "secure", (ii) Customer performs such modifications to its systems as Seller reasonably suggests in order for its systems to be deemed "secure", or (iii) otherwise.

Without limiting the foregoing, seller expressly disclaims all warranties, whether express, implied or statutory, and include but not limited to the warranties of merchantability, fitness for a particular purpose, title, and non-infringement of third party rights.

Under no circumstances shall seller be liable to customer or anyone claiming through or under customer for any loss of profits, loss of data, equipment downtime, loss of goodwill, or for any indirect, incidental, exemplary, consequential, or special damages relating to or arising out of this agreement, even if seller has been notified or the possibility of such loss or damage. The limitations of liability in this section shall apply to claims of every kind, whether based upon contract law, tort law, or otherwise, even if these limitations have the effect of exculpating seller from responsibility for its own negligence, fault, or other conduct.

Notwithstanding the foregoing and in no manner limiting the foregoing, to the extent that the foregoing is not applicable, customer agrees that in no event shall customer's total cumulative liability in connection with this agreement and the services, whether in contract, tort or otherwise, exceed the amounts actually paid by customer for the services during the twelve (12) months immediately preceding the filing of such action. The foregoing provisions shall be enforceable to the maximum extent permitted by applicable law.

This section shall survive any termination or expiration of customer's agreement with seller. Customer acknowledges that this limitation on liability was specifically bargained for and is acceptable to customer. Further, customer's willingness to agree to the limitations contained in this section was material to seller's agreement to enter into this agreement.

d.) **Force Majeure:** Seller shall not be responsible for failure to render any services hereunder due to causes beyond its control, including, but not limited to, work stoppages, fires, civil disobedience, riots, rebellions, floods, war, acts of terrorism, delays in transportation, accident, failure of Customer to provide a suitable operating environment for Seller, hardware malfunctions caused by defects in software or otherwise, failure of Customer to allow Seller access to its computer system, acts of God and other similar occurrences.

4. PAYMENTS: The Customer shall pay Seller the total fees and price for the Services by: (i) an initial deposit in the amount of 50% of the total proposal upon execution of this Agreement, if any; and (ii) payment of the full amount of the balance of the total fees and price on or before the date the Seller begins the Services. Any services provided to Customer by Seller, which are not included under this Agreement, will be charged to the Customer at Seller's then applicable rates and terms, and Customer agrees to pay all such charges on or before thirty (30) days after the date of Seller's written invoice(s) for same. Seller will have no obligation to perform any services for Customer, whether included in this Agreement or otherwise, unless all charges, fees, and taxes for Services rendered under this Agreement have been paid in full by Customer when due. In the event of non-payment of any sum due and owing under this Agreement, Seller shall have the right to suspend or immediately terminate all Services and other services, without notice, and may determine whether or not to reinstate any services upon receipt of payment in full of all sums owed.

5. HIRING OF SELLER'S EMPLOYEES: In the absence of Seller's prior written consent, and for a period of twelve (12) months after the expiration or termination of this Agreement, for any reason whatsoever, Customer agrees not to hire or engage, directly or indirectly, any person who, at any time during the twelve (12) months immediately preceding such hiring or engagement, was an employee of Seller employed to perform the Services or other services similar to the Services for any customer of Seller. Seller and Customer agree that the damages from a breach of this Section would be difficult to ascertain. Therefore, in the event Customer breaches this provision, Customer agrees to pay Seller, as liquidated damages and not as a penalty, a sum equal to twenty-four (24) months pay for each former employee of Seller hired by Customer, at the rate paid by Seller for the last full month of such employee's employment with Seller. In addition, Seller shall be entitled to temporary and permanent injunctions in order to prevent or restrain any such violation of this Section by the Customer or its partners, agents, representatives, servants, employers, employees and any and all persons directly or indirectly acting for or with the Customer. These remedies shall be in addition to, and not in limitation of, any other rights or remedies provided to Seller hereunder or available to Seller at law or in equity.

6. ARBITRATION AND FEES: Any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association, and judgment upon the award rendered by the Arbitrator(s) may be entered in any court having jurisdiction. Such arbitration shall be held in Miami, Florida. As part of the award of any arbitration, the Arbitrator(s) may award all costs and expenses, including reasonable attorneys' fees to the prevailing party. If it is necessary, following the arbitration award, for a party to enforce the arbitration award in court, such party may receive, in addition to enforcement of the arbitration award, attorney's fees and other costs and expenses incurred by it in any such court proceedings. The parties specifically agree that venue for any such court proceedings shall be in Miami-Dade County, Florida, and submit to the jurisdiction of such court.

7. GENERAL:

a.) This Agreement constitutes the entire agreement between Seller and Customer with respect to the purchase and sale of the Services and no representation or statement not contained herein shall be binding upon Seller or Customer. This Agreement may be modified or amended only by a written instrument that expressly refers to this Agreement and that is executed by both Seller and Customer.

b.) This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns. This Agreement and obligations of the Customer are not assignable without the prior written consent of Seller. Any attempt by Customer to assign any rights, duties, or obligations, which arise under this Agreement without such consent, will be void.

c.) Customer shall not make any deduction from, nor assert any right of set-off against, payments due to Seller without Seller's express prior written authorization.

d.) Seller may, for the performance of any of the various services required of Seller under this Agreement, utilize the services of independent contractors selected by Seller.

e.) Any notice(s) to be given under this Agreement shall be in writing and sent by hand delivery or certified mail, return receipt requested, to the appropriate party at the address set forth in this Agreement.

f.) This Agreement shall be governed by and construed in accordance with the laws of the State of Florida including all matters of construction, validity, performance, and enforcement.

g.) This Agreement may be executed in multiple counterparts, each of which shall be deemed to be an original and of equal force and effect, and all of which taken together shall constitute one and the same instrument.

h.) If any provisions of this Agreement shall be held to be invalid, illegal, or unenforceable, the validity, legality and enforceability of the remaining provisions shall not in any way be affected or impaired thereby.

i.) Neither the failure nor any delay on the part of Seller to exercise any right, power, or privilege hereunder shall operate as a waiver thereof, nor shall any single or partial exercise of such right, power, or privilege preclude any other or further exercise thereof.